Passenger priorities
post COVID 19
October 2021

A report supplied by

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Why did we conduct the research?

Need for research

Heathrow would like to understand how passenger needs have changed and what may be more important in a post-COVID world.

Methodology:
- A survey on the Horizon community
- A re-run of a previous survey run on the Horizon community (in October 2020).

Dates:
28th September – 5th October 2021

TW1

Audience
364 members of the Horizon community (October 2021)

TW1   How many of these are the same people who completed this topic in 2020?

Tim Wheen, 11/10/2021

What were we testing?

We asked passengers to rank each of the key needs within these passenger buckets from most important to least important to them.

In doing so, we wanted to see if any of these needs had changed, or priorities within them have shifted during the Covid 19 pandemic. We also wanted to understand if anything was missing from these passenger buckets.

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Key take outs

Passenger are moving into a 'post-COVID' mindset. Although priorities haven't changed, the context in which they're choosing has. Passengers will expect increased flight availability over the coming months - providing this is the most important driver of consideration for Heathrow. Beyond this, passengers expect accessibility, including convenient parking, drop-off and public transport options, as well as a seamless journey through the airport.

Airport choice

As we move into a post-COVID world, with air travel continuing to open up to more destinations; reliability and safety remain of paramount importance.

Passengers increasingly expect sensible COVID measures to be woven into a seamless airport experience.

Getting to the airport

Ease of getting to an airport is a key driver of consideration. Surface access is key and necessitates a passenger-friendly approach to drop-off areas, charges and meeting points.

Public transport links are important too, but passengers aren't likely to consider options with multiple changes, so direct links to as many population centres as possible is key.

Predictable and reliable journey

Clear signage can ensure a speedy, smooth and stress-free journey through the airport.

Passengers are entering airports in a more uncertain state of mind at the moment, so clear communication through signage can significantly reassure.

Basic comforts

Feeling comfortable increasingly means cleanliness to passengers.

Plenty of hand sanitizer stations as well as regular cleaning of high touchpoint areas (e.g. toilets, seating, restaurants) is key to helping passengers feel safe and secure in this new environment.

Enjoyable and connected

As the airport experience evolves to one which must accommodate for COVID, passengers still expect to be able to take time out and relax within their airport journey.

Whereas passengers may once have accepted partial availability (e.g. shop closures), they now expect full availability of all relevant amenities.

Cared for

At a time of increased uncertainty for passengers, with restrictions and requirements changing regularly, staff presence remains crucial.

The empathy and extra context which staff can offer is unparalleled. Staff should be always visible and on hand to support passengers as more begin to come back to air travel.

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Airport choice remains the most important consideration when it comes to passenger's priorities around travel

Average points allocation out of 100

	Oct '21	Change vs. Oct '20
Airport Choice An airport choice that enables me to fulfil my travel plans	**24.1**	**-0.4**
Getting to the Airport An airport that is easily accessible and good value for me to travel to using a range of transport options	**21.2**	**-0.1**
Predictable and Reliable Journey I have a predictable and reliable journey because it is easy to move to, through, and from airport	**19.8**	**0.3**
Basic Comforts My basic comforts are met so that I feel comfortable and secure	16.0	0.1
Enjoyable and Connected Experience I have an enjoyable and connected experience whilst spending time at the airport	10.4	0.1
Cared For I feel cared for because I feel supported and valued in all eventualities	8.6	0.1

Airport Choice is more important to Business than Leisure, and Premium than Extra Care travelers. **While Getting to the Airport** is more important to Leisure than Business, over 55s than under 55s, and UK vs. Non-UK travellers.

Predictable and Reliable Journey has become slightly more important. As we see elsewhere in this report, expectations around convenience and a seamless experience are beginning to rise as passengers enter a 'post-COVID' mindset.

> *As much as I like my inflight champagne the destination is the reason for travel. I want an airport with direct flights to where I'm going right now. Ideally with good hotels and parking options.*

> *If I do not have a reasonable idea how long I might be in Arrivals Immigration and Health Checks, I cannot arrange ongoing transport connections with ant confidence.*

So What?
Passenger priorities haven't changed in the last 12 months, but **the context in which they're choosing has.** Passengers will expect increased flight availability over the coming months - providing this is key to consideration of Heathrow. Passengers expect accessibility, including convenient parking, drop-off and public transport options, as well as a seamless journey as they move into a 'post-COVID' mindset.

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Passengers in the 'Post-COVID' mindset expect convenience and a seamless airport journey

But, overall, safety and security remain paramount.
Passengers need Heathrow to create a seamless, predictable experience – e.g. no crowding, smooth passage through check-in, security - this will reduce stress, save them time and allow them to feel safe and secure.

Even in a post-COVID world, expectations around cleanliness and organisation (to avoid crowding) remain high:

Cleanliness: expectations around cleanliness and hygiene are high, with plenty of hand sanitizer stations and frequent cleaning of high touchpoint areas like toilets.

Social distancing: Unnecessary crowding can and should be avoided through good organisation, keeping queues moving and sensible management of crowds as they move through the airport.

Extra checks kept to a minimum: Passengers now expect certain COVID-related measures to have been removed. Any that are still in place should now be as orderly and efficient as possible, with clear communication needed via staff and signage to ensure a seamless experience.

"

"Particularly in current times, where travel is still a somewhat new experience and one feels more nervous than usual, knowing that the experience is predictable, reliable and easy from beginning to finish is a great help to familiarise oneself again with the experience and counter any feelings of anxiety"

The government needs to get a grip (right now everything - customs, passports, onward travel, covid restrictions/regulations - is a complete mess) and Heathrow needs to play its part in mitigating this and ensuring that entering and exiting the country is as smooth, reliable and as safe as possible.

"

So What?
Passengers are increasingly expecting society to have to live *with* COVID, which means they expect airports to find a new normal too. Expectations around cleanliness in relation to saftery are still high and need to be kept at the forefront of any planning.

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Passengers suggest a few things are missing from Heathrow's focus

Top words for anything really important missing

So What?
Surface access remains key in passenger priorities and so improvements in the offering must remain near the top of Heathrow's agenda. Offering options from different destinations is the most important aspect of surface access developments but providing options that are safe and clean etc. is also necessary.

What's missing?

Drop-off and Meeting Points – The new drop-off charge has created frustration for some passengers. Others would like there to be more convenient meeting points and facilities for those meeting travellers on arrival.

Parking - Being able to park easily, affordably and securely remains important when choosing an airport for many. Public transport isn't an option for many due to where they live in relation to the airport (e.g. available rail links not convenient), so it's important that parking facilities are convenient, safe and cost-effective.

Speed/Ease of use – Passengers want to be able to move around the airport quickly and smoothly, and some suggest they'd be willing to pay for a fast-tracked experience. Security is a particular area of focus here – passengers want to be able to move through as quickly and efficiently as possible, and note that good communication from staff and on screens and signage (around what passengers need to do to move through quickly) is essential.

Disabilities – some feel that passengers with disabilities are an 'afterthought' for Heathrow. They'd like more assistance, consideration, announcements, signage and extra staff/trained staff to feel that they're a priority.

COVID-related concerns: Passengers are wary of the added burden of any extra COVID-related measures which could now be removed. Others suggest there should be on-site testing facilities (e.g. similar to those found in places like Boots).

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As we learn to live with the virus, many COVID precautions are expected to continue within airports

Which of the following precautions would you still expect to see at an airport, even as rules relaxed elsewhere?

Hand Sanitising Stations	86%
Enhanced Hygiene Processes	82%
Enforced Mask Wearing	64%
Social Distancing Measures	60%
Something else (please tell us what)	12%

In current climate, post-Covid, I need to know that the airport will be clean and safe.

I will not consider travelling via plane if I do not feel I am being kept safe from infection - cleanliness and social distancing are a must.

If social distance measures were to remain in place, where would you most expect to see them?

At security	79%
At border control	78%
The check-in hall / baggage drop	78%
At the gates	74%
In the departure lounge	64%
In the baggage hall	58%
In the arrival's hall	55%
Somewhere else (please tell us what)	9%

So What?
There's widespread awareness that airports are high touchpoint areas, carrying increased risk of COVID transmission vs. most public places. For this reason there's considerable expectation that many COVID-related measures will remain in place in most areas within airports.

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Airport choice is driven by offering the right flights, to the right destinations, at the right times

Avg. rank position out of 9	Oct '21	Change vs. Oct '20
		Differences aren't statistically significant
It offers flights I want and when I need	2.3	-
It is reliable and safe	2.7	⬆ 0.2
It enables good value and affordable travel	3.7	-
I trust it will deliver clear/comparable information	4.8	⬆ 0.1
It is familiar to me	5.2	⬆ 0.1
It is socially responsible	6.4	⬆ 0.2
What I have heard about the airport experience	6.4	⬇ -0.3
It reflects my environmental values	6.7	⬇ -0.1
I trust it will offer brands for me	6.7	⬇ -0.2

Flights I want, when I need - Travelers think destination-first, then look up which airports offer flights to that destination without necessitating hassle in onward travel arrangements. This is more important to Premium (1.9), over 35s (2.3) and Male passengers (2.2).

Reliability and safety has become slightly more important than Oct 2020.

Reliability includes a seamless experience through the airport, as well as any connecting flights and transport links to and from the airport. In the current climate – with regards to COVID – cleanliness is a key part of safety. This metric is more important to Female (2.5) than Male (2.9) passengers.

" *When planning a holiday, we usually think about a destination and then look to see which airport offers flights to that destination.*

I really do not want to have to travel on the wrong day or at dreadful times simply because that is the only way to get to, say, Manila or Nur Sultan (to give two real examples). "

Top 3 themes October 2020:
- It offers flights I want and when I need
- It is reliable and safe
- It enables good value and affordable travel

So What?
As we move into a post-COVID world, with air travel continuing to open up to more destinations; reliability and safety remain of paramount importance. Reliability means a seamless experience, reliability of departure times, connecting flights and onward travel links, while safety now increasingly means cleanliness. Passengers expect sensible COVID measures to be woven into a seamless airport experience.

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Passengers must be able to get to an airport quickly and efficiently, with minimal changes

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Avg. rank position out of 6

	Oct '21	Change vs. Oct '20
		Differences aren't statistically significant
An airport that I can get to quickly and efficiently	2.3	-
An airport that I can access easily - with minimal changes	3.0	▲ 0.2
I have confidence the transport I choose will arrive on time	3.5	-
An airport that has good value transport options	3.8	▼ -0.2
An airport that offers a range of transport options to suit my needs	3.8	-
An airport that has clear/comparable information to help me make decisions about my transport	4.7	▼ -0.1

TW2

An airport that I can get to quickly and efficiently remains key for passengers too, and is why many passengers say they choose to drive. This links with passengers' suggestions around the important of surface access (slide 7), which must remain a high priority. No significant subgroup differences.

An airport that I can access easily - with minimal changes – with public transport, time efficiency, ease and a smooth, seamless experience means not having to change (e.g. from train to train) on the journey to Heathrow. Direct transport links from as many population centres as possible is key to consideration. No significant subgroup differences.

" *Getting to the airport is one of the most stressful aspects of flying. I want to ensure that a good range of options is there to minimise stress.*

I look for an airport that does not charge drop-off fees for passengers who do NOT have the option of using public transport to reach the airport. "

Top 3 themes October 2020:
- An airport that I can get to quickly and efficiently
- An airport that I can access easily - with minimal changes
- I have confidence the transport I choose will arrive on time.

So What?
Ease of getting to an airport is a key driver of consideration. Surface access is key and necessitates a passenger-friendly approach to drop-off areas, charges and meeting points. Public transport links are important too, but passengers aren't likely to consider options with multiple changes, so direct links to as many population centres as possible remains key.

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TW2   Can you confirm that the top 2/3 attributes under each theme have changed the same versus 2020? It looks like they have?

Tim Wheen, 11/10/2021

Classification: Internal

Clear signage can help to reassure passengers at a time that they're feeling very uncertain

Avg. rank position out of 8	Oct '21	Change vs. Oct '20
		Differences aren't statistically significant
Clear signage throughout the airport	**3.7**	⬆ **0.1**
Delivers speedy progress through the airport	3.9	-
Delivers smooth progress throughout the airport	4.1	⬆ 0.1
It is easy to move through and exit	4.5	⬇ -0.4
There is a natural flow throughout the airport	4.6	⬇ -0.2
I feel clearly, consistently and full informed	4.6	-
I know where I am (orientation)	4.8	⬆ 0.1
I am empowered to make the right decisions (including flexibility on booking)	5.9	⬆ 0.2

Clear signage through the airport is very important in the ever-changing environment around COVID restrictions. When moving through the airport, passengers are mindful that requirements may have changed since they last traveled, so clear signage can help to reassure.

This is more important to Female (3.3) and Leisure (3.4) travelers.

Delivers speedy progress through the airport – passengers' desire for clear communication through screens and signage is all about ensuring a quick, smooth and stress-free journey through the airport. Good organization (e.g. to avoid crowding) is important here too. No significant subgroup differences here.

> *I appreciate, e.g. good signs to the elevators instead of miles of walking, and if there is places to sit around the barriers it is great. Going through terminal 5 is the hardest part of the journey, so anything staff can do to make it easier, I am eternally grateful.*

Top 3 themes October 2020:
- Clear signage throughout the airport
- Delivers speedy progress through the airport
- It is easy to move through and exit

So What?
Clear signage can ensure a speedy, smooth and stress-free journey through the airport. Passengers are entering airports in a more uncertain state of mind at the moment due to ever-changing COVID restrictions, as they're aware that restrictions may well have changed since they last travelled. Clear communication through signage can significantly reassure.

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Basic comforts means cleanliness, security and places to sit – clean *means* safe to many

Avg. rank position out of 14	Oct '21	Oct '20
	Not directly comparable as one extra code has been added in Oct '21	
I feel safe	**4.5**	**4.1**
Clean facilities	**4.7**	**4.2**
I feel secure	**5.1**	**4.7**
Places to sit/rest/wait	5.6	5.2
My luggage is handled with care, kept safe and travels with me	5.8	5.5
Food and drink outlets	7.0	6.8
Ability to socially distance if I want to	7.2	-
Fresh air	7.4	7.1
Me and my travelling party are kept together	7.7	6.9
Ability to charge and connect my electronic devices to WiFi	7.8	7.5
Privacy (incl data)	7.8	7.5
Availability of ATMs & Foreign Exchange	11.0	10.2
Wheelchairs/buggies are available	11.8	10.9
Religious needs are considered	13.1	12.0
Places to smoke	13.5	12.6

- **Safety and security** – as identified previously (Oct '20), passengers' perceptions of safety in an airport are now shaped by how well COVID risks are managed. Social distancing, clean surfaces and hand sanitizer stations are key to perceptions of safety. No significant subgroup differences.
- **Clean facilities** – some describe paying close attention to hygiene and cleanliness in places like toilets and other shared spaces throughout the airport. It seems expectations around regular cleaning have been permanently raised. No significant subgroup differences.
- **Social distancing** is important, but not as much as other COVID risk-related metrics. Passengers now expect these measures to be integrated seamlessly into the airport journey. This is more important to over 55s (6.6).

"
In current climate, post-Covid, I need to know that the airport will be clean and safe

Access to seating, refreshments, means of communication with family and the wider world, cleanliness and being treated with courtesy.
"

Top 3 themes October 2020:
- I feel safe
- Clean facilities
- I feel secure

So What?
Feeling comfortable increasingly involves cleanliness to passengers who's mindful of the risks around COVID when moving through busy, shared spaces. Plenty of hand sanitizer stations as well as visible, regular, cleaning of high touchpoint areas (e.g. toilets, seating, restaurants) is key to helping passengers feel comfortable in this post-COVID world.

Classification: Internal

Horizon

Enjoyable and connected experiences need to be relevant, while some expect to be able to pay for enhanced comfort

Avg. rank position out of 8

	Oct '21	Change vs. Oct '20
		Differences aren't statistically significant
Access to amenities that are relevant to me	3.1	-
Enhanced personal comforts available when I want them	3.8	⬆ 0.2
Appealing surroundings	4.0	-
I can stay connected to my personal life	4.3	🔻 -0.1
I can stay connected to the wider world	4.8	🔻 -0.1
Lots of things to do e.g. shops and experiences	4.7	-
I can stay connected to where I am	5.1	-
I can stay connected to my work	6.2	🔻 -0.1

Access to relevant amenities – passengers have told us before that enjoyable experiences need to be relevant to their needs and expectations, so Heathrow should expect them to vary considerably by passenger group. Lounges, communal spaces and data packages will be important in meeting needs. This is more important to Leisure (2.8) than Business (3.5) and Family (3.6) passengers.

Enhanced personal comforts – within the airport journey, passengers are grateful of the opportunity to enjoy the experience by taking some time out to relax (in a lounge, restaurant, while using WiFi). Some are keen to point out that they're willing to pay for this. This is more important to Premium (3.1) than Leisure customers (3.8).

"*Supervised children's play areas to allow parents to shop, eat, etc. before boarding.*"

"*Free drop off for electric vehicles.*"

"*Lounges and premium services make up a lot of the experience for me.*"

Top 3 themes October 2020:
- Access to amenities that are relevant to me
- Enhanced personal comforts available when I want them
- Appealing surroundings

So What?
It's important to remember that as the airport experiences evolves to one which must accommodate for COVID, passengers still expect to be able to take time out and relax within their airport journey. Relevant amenities include lounges, bars and restaurants, shops and WiFi plans – whereas passengers may once have accepted partial availability (e.g. shop closures), they now expect full availability of all relevant amenities

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CARED FOR

Airport staff being visible and available is the most important way to make passengers feel cared for

Avg. rank position out of 7 | Oct '21 | Change vs. Oct '20

Differences aren't statistically significant

	Oct '21	Change vs. Oct '20
Airport staff are always visible and available	3.1	↓ -0.2
I receive courteous service I can rely on	3.1	-
Airport staff are ready and able to assist (Inc. new tech)	3.1	↑ 0.1
Airport staff can support and inform in adverse circumstances	3.3	-
I feel noticed and valued	4.6	↑ 0.1
I receive personal treatment	5.2	-
I am made to feel special	5.5	↑ 0.1

Staff being visible and available remains important despite falling slightly, perhaps as we gain clarity around the requirements for air travel post-COVID (and lockdown restrictions have stopped changing in the UK). As more passengers return to air travel, staff being present to support with any queries, need or questions as they move through the airport will help them feel reassured. This is more important to Leisure (2.9) and Female (2.9) passengers.

Courteous and reliable service – as we've seen before (Oct '20), friendly polite staff that passengers feel they can approach for reliable advice/support can help to reduce airport stress considerably and make the journey easier. It's important to consider expectations here in the context of consideration for those with disabilities, which passengers feel is missing currently (slide 7). This is more important to over 35s (3.0) than under 35s (4.2).

"*Meet and greet service for disabled people and those traveling with them… facilities such as wheelchairs or mobility scooters once airside, to ensure they can shop/dine/refresh easily, just like able-bodied people.*"

Top 3 themes October 2020:
- Airport staff are always visible and available
- I receive courteous service I can rely on
- Airport staff are ready and able to assist (including with new technology)

So What?
At a time of increased uncertainty for passengers, with restrictions and requirements changing regularly, staff presence remains crucial. We've seen earlier that clear signage is a key part of communication, but the empathy and extra context which staff can offer is unparalleled. Staff should be always visible and on hand to support passengers as more begin to return to air travel.

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Moving forward

Understand that the passenger mindset is evolving to one which expects to live with COVID, and for COVID safety measures to be integrated seamlessly into the airport experience in the same way that previous new security measures (e.g. liquids) have.

Ensure a relevant flight calendar, with the best possible availability to safe destinations – this is the key driver of airport consideration. Ensure Heathrow continues to remain an airport of choice by offering great public transport options, while paying attention to passenger feedback around the new drop-off charge (which is currently causing frustration).

Cleanliness is now a key component of safety and comfort – hand sanitizer stations, and regular cleaning of 'high touchpoint' areas such as toilets, seating and restaurants help passengers feel that they're in a safe environment. These components need to be visible to passengers to build trust.

Ensure staff availability, while supporting them to deliver clear, actionable guidance to travellers who're feeling uncertain about what's required of them in the new air travel environment. Clear signage is important too, and – when the right information is delivered in the relevant places - can help to achieve a stress-free, seamless airport journey.

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THANK YOU - HERE'S A BIT MORE INFORMATION ABOUT YOUR COMMUNITY

About Horizon

The community is a hub on which our members – both users of Heathrow and potential users come to talk all things airports, both with us and their peers. We run a range of research topics with members including surveys, discussions, vox pop recordings, and offline workshops.

Any questions?

Do not hesitate to contact the project team…

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