

Evaluating the Traveler's Perspective to Improve the Airport Customer Experience

Executive Summary

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1. Introduction

Airports are dynamic communities that continue to evolve as they provide essential modes of transportation to a large traveling public. The airport is the gateway representing the community, whether it is considered a regional, city, county, state or federal airport. While U.S. airports strive to redesign the airport experience through terminal expansion, architectural renovation, and amenity improvements, it is also critically important to take a customer-centered approach and rethink the airport experience through the customers' perspectives.

ACRP Report 157 provided a good foundation for understanding customer service at airports. *ACRP Research Report 227* (Guidebook) builds on that foundation to examine the traveler's perspective on improving customer experiences. Guidance is provided for the airport operator from the perspective of the airport traveler's journey, starting with pre-trip activities to journeying through the airports and back to the point of origin or some other destination. Additionally, the research addresses current and evolving customer experiences and expectations; identifies future customer experience-related trends and developments; and generates tools helping airport professionals to anticipate travelers' preferences and respond to their needs in order to deliver a seamless customer experience. The findings are presented from a general traveler perspective, as well as from the perspective of specific traveler segments, allowing airports to distinguish between the needs of different travelers that journey through their airports. The Guidebook also presents a data analysis approach that individual airports may undertake to better understand their customers. The findings further explore the sentiments different traveler segments may experience at various points of the journey.

Feedback was sought from airports recognized for providing excellent customer experiences. Remarkable examples are noted of other airports offering programs that excel in one or more areas of meeting and exceeding customer expectations. Recommendations for established best or notable practices are presented to be considered in improving airport customer experiences.

2. Research Approach and Methodology

The research effort focused on the traveler's perspective through U.S. airports. With over 368.5 million different people traveling through U.S. airports each year, satisfying travelers' needs holistically can become a challenge. It is, therefore, incumbent upon the airport to understand its demographic base and determine the most appropriate solutions to address its travelers' unique needs. The Guidebook provides an example of an approach to conducting an analysis of traveler needs and areas of concern, as well as potential solutions to address them.

A comprehensive approach to collecting data from secondary and primary sources was used. Secondary research was conducted through a thorough literature review on the current practices implemented by airports and future trends to enhance the customer experience. A primary data collection effort gathered firsthand data from travelers on their perspectives on how airports can improve customer experiences. The data was collected through focus groups, airport and organization surveys, and social media/traditional media analysis. This multidimensional approach allowed the research team to identify potential solutions to challenges faced by travelers journeying through U.S. airports. The impact of COVID 19 on the findings and recommendations was incorporated as appropriate throughout the traveler's journey points.

3. Traveler Segmentation

The research effort built on the primary segmentation in *ACRP Report 157* to determine whether differences in perspectives among certain groups were unique enough to warrant further classification of traveler segments. The traveler segments in the Guidebook expand on *ACRP Report 157* traveler segmentation to include business travelers, families with children, infrequent travelers, military travelers, non-native English speakers, travelers with disabilities, senior travelers, solo/couple travelers and student travelers.

4. High-Level Findings

An evaluation of the travelers' firsthand perspectives indicates that their experience traveling through U.S. airports does not meet their overall expectations. Data collected revealed the key concerns and constraints faced by today's travelers and allowed the research team to identify preliminary recommendations and processes and practices to address these issues.

The perceptions, needs, desires and areas of concern shared by most or all traveler segments are summarized as follows:

a. Greater transparency/ kept informed

- Would like to have greater transparency and be kept informed of key elements that impact their journey including wait times, flight status, baggage tracking and factors which may disrupt their journey.
- Oftentimes not aware of some of the amenities and services offered by the airport.

b. Greater control of the journey

- Greater control over their journey, which includes being able to identify the best mode of transportation to the airport given current conditions and having more control over the amount of time spent at various journey points.

c. Easily accessible/up to date information

- Easily accessible, up to date information provided on the website/mobile app addressing the needs of various traveler groups.
- While travelers do use the airport app, there is a preference for using the airline app since it contains information for the entire journey including the destination airport.

d. Improved wayfinding/signage

- Need for improvement in wayfinding/signage including clearer signage (in certain cases further in advance of decision points, such as airport entry), descriptive signage, auditory signals, tactile maps and the use of universal symbols.

e. Advance notification of full parking

- Desire for advance notification when parking is full and clear information on the next available parking facility.
- Easier access to the terminal from parking/ground transportation.
- Ability to make reservations for parking choices.

f. Perception that airport can control security experience

- Provide better information pre-security on wait times and requirements.
- Improved management of security checkpoint lines.
- Provide staff/volunteers to assist travelers at security checkpoint.

g. Concessions located closer to gate

- Desire for concessions to be located closer to the gate area.
- Desire for fresh food to be available for late departing/arriving passengers.

h. International arrivals continues to be a chokepoint

- Often experienced long lines and lack of clarity in processes and procedures.
- Inconsistency in requirements at different border points.

i. Improve baggage claim process

- More could be done by the airport to improve the baggage claim process, including improving information/wayfinding to the baggage claim carousel and information on expected baggage arrival time.

j. Experience challenges departing from the airport

- Experienced challenges with the long walking distances and poor signage, difficulty with finding parking when picking up loved ones and when returning from a trip, difficulty with accessing the ride-sharing service and poor/lack of customer service.

k. Preference for human interaction when need assistance

- Majority of travelers indicated that technology/signage helped make their journey easier; however, most traveler segments indicated they would still prefer to have some kind of human assistance available to provide guidance.

l. Training for airport staff

- Airport personnel, in general, need training on empathy, on the airport layout so that staff/volunteers are better informed when providing directions/information, on anticipating needs of different customer groups and on providing better customer service in general to address the needs of various traveler groups.
- More readily available and easily identifiable staff is desired.

m. Improved ambiance

- Desire to have better environmental conditions at the airport including natural light, cleaner/neutral smells, fewer and less noisy announcements, airy spaces, wider corridors, greener spaces, outdoor areas, and more comfortable seating and sleeping/quiet areas at U.S. airports.
- Cleanliness throughout the airport, more charging stations, free and more easily accessible Wi-Fi and adequate restrooms near the gates.

The research also captured the unique perspectives of the nine traveler segments identified. The following illustrations summarize the key needs, recommendations and areas of concern expressed by each traveler segment.



BUSINESS TRAVELERS

- Up to date/accurate information on traffic conditions, wait times, boarding times, delays, etc.; better coordination between airport/airline apps
- Departure lobbies often disorganized and chaotic
- Free and easily accessible Wi-Fi
- Improved advance signage on roadways to terminal, rental car return and valet/parking availability
- More control of journey with limited checkpoints
- More work stations with charging outlets



INFREQUENT TRAVELERS

- Confusion with wayfinding and signage upon arrival at the airport/ within the terminal
- More information on what is required at the security checkpoint
- Need for adequate parking facilities close to the terminal
- Baggage claim process slow
- Identifying pick-up locations for ride-share/ ground transportation can be a challenge
- More control of journey with limited checkpoints
- More charging ports and access to free Wi-Fi



FAMILIES WITH CHILDREN

- Additional assistance upon arrival at the airport, check-in, when boarding and disembarking aircraft
- Closer/faster access to check-in from modes of transport
- More affordable food options
- Sensory room for children
- Food concessions open for late arriving flights
- Amenities to address the needs of families with children/nursing mothers
- More empathetic and knowledge staff
- More efficient and organized queues



SENIOR TRAVELERS

- Less reliance on technology – prefer access to a staff member
- Difficult to read FIDS from wheelchair
- Need extra assistance with long walking distances (ex. parking to terminal)
- Preference for human touch over technology
- Improved communication about available services
- Preference for human touch over technology



MILITARY TRAVELERS

- Up to date/ accurate information
- Perception that security/ safety at curbside and baggage claim is not adequate
- More food options pre-security especially when USO is closed
- More empathetic security personnel that are better trained to handle processing of military travelers
- USO beyond security
- Improved wayfinding/ information on baggage carousel number



NON-NATIVE ENGLISH SPEAKERS

- More comfortable seating/ sleeping areas
- Food options to cater to different cultural needs/ desires
- Free luggage carts
- Multilingual staff or staff with tablets to assist with translation; staff that can anticipate needs
- SIM cards/local phone rental upon arrival at destination
- Keep international travelers better informed about the processes /procedures at CBP
- Need for more ground transportation and efficient options



TRAVELERS WITH DISABILITIES

- Particularly sensitive to uncertainty at the airport
- Feeling of vulnerability being passed from one staff member
- Less likely to focus on aesthetics and more on functional items
- Pet relief post-security
- Preference for human touch over technology
- Improved meet and assist service with staff trained to be empathetic to their needs
- ADA-compliant infrastructure (website, kiosks, navigation, etc.)



SOLO/ COUPLES TRAVELERS

- Optimize check-in facilities with self-bag check
- More empathetic, welcoming and friendly staff
- Separate line for single travelers/ travelers with one bag
- Preference for human touch over technology
- Clear processes/ procedures at international arrivals
- Improved wayfinding for transfer passengers
- Option to purchase one-time fast pass



STUDENT TRAVELERS

- Advanced signage on construction/ lane closures
- Value simplicity and efficiency; paperless experience
- Free and easily accessible Wi-Fi
- More affordable food options
- More control of journey: optimized check-in facilities; ability to print bag tags at home; biometrics screening/ processing
- Experience heightened stress at security checkpoint
- Free luggage carts

5. High-Level Recommendations

Recommendations to address the perspective shared by most/all travelers and the perspective of specific traveler segments have been provided in detail in the Guidebook. Several high-level recommendations to address the traveler's perspectives overall include:

a. Create traveler personas	Create personas unique to the airport to better understand travelers' needs, motivations, sentiments and consumption habits. Creating personas based on the airport's demographic spectrum enables the airport to focus on a manageable set of travelers sharing similar characteristics, rather than trying to individualize each traveler, and allows the airport to better empathize with the needs of its traveler segments that may have unique needs.
b. Develop a journey map	Helps reveal the gaps between the travelers' current experiences and their desires, allowing the airport to focus on specific needs identified at different stages. This data can then be used to design interventions to alleviate pain points and improve overall customer experience. A journey map allows airports to organize their resources and employees around customer needs.
c. Utilize social media analysis to understand	Airports need to capitalize on the availability of social media comments and ratings to better understand their customers. Social media analysis is a valuable tool for capturing passenger sentiments. Airports can use sentiment analysis information to identify specific pain points that impact overall customer experience, identify and address the root causes of negative comments, conduct a quick and early evaluation of new initiatives, or sound an "alarm" that brings more attention or resources to a specific passenger concern or issue.
d. Address basic needs first	Basic needs have to be met first in order for guests to recognize and appreciate other aspects of the airport. When guests' basic needs are not met, the added value of any "wow" factors is greatly diminished.
e. Focus on the emotional experience	"Emotional Intelligence is the ability to sense, understand and react to our own emotions (self-awareness) and other's emotions (social awareness)" (D'Andrea, CXE). Airports are emotional spaces, but this can be capitalized upon by designing infrastructure and interventions that stir positive emotions in travelers and make them forget their stress.
f. Improve access to information	This includes providing various mediums to contact airport customer service, a user-friendly website and easily accessible mobile app (if applicable) with information pertinent to the traveler.
g. Use technology to help manage queues	Use technologies to monitor flow and queues at chokepoints and share the information with travelers to inform them in advance about the queueing time and manage their expectations.
h. Enhance collaboration with business partners	Closer collaboration among the airport, its business partners and stakeholders is needed to deliver the personalized and seamless experience desired by today's travelers. This may include improving communication and developing shared customer experience standards.
i. Keep travelers informed throughout the journey	Effective communication is critical to ensure that travelers are well informed and feel like they have greater control over their journey. Travelers value information and intelligence on factors that may disrupt or impact their journey including information on flight delays, cancellation predictions, real-time flight status updates and walking time between gates and concessions/points of interest.

j. Equip frontline staff with the right skills	Frontline staff should be skilled at empathizing with unique traveler segment needs. Staff should have access to the tools and information to address common traveler needs/concerns. All staff at the airport, even those behind the scenes, need to receive some form of basic customer experience training to be able to improve interaction with one another.
k. Enhance employee engagement	One of the key drivers of customer experience that is often overlooked by airports is employee experience. An engaged workforce can be achieved through effective alignment of strategic talent management practices to hire, train, motivate, retain, and promote employees with the right talent and mindset. This often involves systematically designing and aligning organizational practices such as recruitment, selection, training, leadership development, employee recognition, performance management, and succession planning. When an airport invests in its employees, employees are more likely to become more engaged and motivated to improve job competency and perform well on their jobs. This engagement reflects positively in the customer experience through a more dedicated, patient, and empathetic workforce. Leaders and managers can greatly enable their employees when they are supportive and reinforce behaviors that contribute to customer experience.
l. Enhance talent management practices to support the customer	Airports can improve customer experience, in part, through a well-designed selection and assessment of their workforce. Once the talented workforce is selected, organizations need to invest in their employees through provision of training, developmental opportunities, and encouragement of career progression.
m. Balance technology with human touch	The trend of relying on technology to increase efficiency and automatization needs to be balanced with opportunities for human interaction and with providing passengers with easy access to a “human touch” when needed. To do so effectively, airports need to understand the customer journey, identify unique customer touch points, and strategically decide whether to provide tech touch, human touch, or both, throughout the customer journey. Investing in and training employees to deliver the right “human touch” can significantly improve customer experience at any airport, but is especially important for smaller and resource restrained airports. In cases when technology is not readily available or affordable, cordial, helpful, and engaged employees can effectively create a sense of place and deliver an exceptional customer experience through pleasant and effective interactions with passengers.
n. Shift towards being a more culturally competent airport	Airports that think about what future passengers will look like and what their needs will be will have a competitive advantage in preparation for emerging business needs and will be in a better position to increase their business growth and profitability. Successful organizations tend to approach culture from a broad perspective – in addition to meeting the needs of customers of diverse nationalities, airports should also consider the needs of customers of different ages, genders, geographic locations, occupations, health conditions, etc. Airports that attend to the expectations of each of these segments differently are also more likely to adopt more innovative solutions with the help of technology and develop a higher level of cultural competence. To better understand, prepare for, and meet the needs of diverse passengers, airports should also strengthen their efforts toward having a more inclusive and diverse workforce. This will require a continued emphasis on hiring a diverse workforce at the airport to best serve the growing diversity of customer segments.
o. New designs should be more human-centric	The airport is a beehive of travelers and the airport needs to design experiences that appeal across the demographic spectrum. In an effort to enhance customer emotions and experience, more airports are expected to turn to research on environmental psychology and

airport servicescape to implement gradual and incremental changes to the physical and social environment (e.g., level of lighting, display of artwork, use of color). That may also bring about a heavier focus on customer perspectives and inputs in the terminal design and renovation processes. Airport designs that reflect the culture of the region can create a sense of uniqueness, make the airport experience more memorable and meaningful, and elicit higher levels of customer delight. The unique features can also enable airports to communicate who they are as an organization and what they value, fostering stronger connections with their customers.

Airports throughout the world are engaged in trying to understand the motivation and perspectives of their travelers. It takes an entire village to complete the customer journey from prior to arrival at the airport to arrival at the airport through various points, and the journey back to the point of origin or any other destination, all of which are influenced by not only the airport operator, but business partners/service providers, federal agencies, and the airport community. Any experience inside or outside the airport operator's control may diminish the positive experience of the customer traveling through the airport to his/her destination. To fully benefit from the available research findings, airports will need to consider their unique objectives and circumstances. Knowing which passenger segments are targeted and the desired outcomes can enable airports to identify the most relevant research findings.

For further information, please refer to the Guidebook. An online multimedia experience provides an alternative visual reference to support the recommendations in the Guidebook.