



# Synthesis of Consumer Insights – Need Areas

Full report, Stages 1-6

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## 1. Introduction and project objectives

This project is part of Heathrow's wider initiative to update and validate its understanding of the key factors that affect consumers – both current and future – at every touchpoint: to, from and within the airport. The drivers behind this project are threefold:

- To put consumer insight at the heart of decision-making on how to achieve its vision **“to be an extraordinary airport, fit for the future”**.
- To inform the airport expansion strategy
- To inform Heathrow's future business planning by understanding the outcomes and measures that matter most to consumers

As context since 2022, the Civil Aviation Authority (CAA) has been moving towards outcome-based regulation, shifting away from the previous service proposition model monitored under the Service Quality Rebate Scheme. Under this approach, Heathrow is required to define a set of outcomes – representing high-level, enduring consumer needs – with oversight provided by the Consumer Challenge Board (CCB). The CAA define outcomes as: *the range of higher-level consumer objectives that are the most important aspects of the airport service that consumers value*. For each outcome, Heathrow is required to identify the measures that will provide ongoing evidence of how the outcome is being achieved.

A synthesis of existing research and engagement provides the means to triangulate data and insight, and to establish a consumer-led foundation for both strategy development and business planning. Originally designed as a three-stage process, this report marks the completion of the sixth stage, incorporating a further body of evidence, the majority of which was published in 2025 and early 2026.

### Rationale for the approach

The design of this project includes a number of aspects to ensure that the outcomes are based on objective and rigorous analysis:

- The synthesis has been extensive, involving close review of a large proportion of relevant research conducted over recent years – and including 503 separate sources.
- This is the sixth stage, building on four previous waves all of which have drawn from a body of evidence including Heathrow Airport's own research as well as airline and industry reports.
- The synthesis has been conducted by Blue Marble Research, which is an independent research agency with experience of conducting similar exercises in other regulated sectors.
- Three research executives worked on this stage of the synthesis, drawing together the large body of evidence using thematic analysis techniques to develop the themes and need areas. The synthesis has been conducted using a defined process to review and categorise the research sources (described below) meaning that the appropriate weight has been given to the reports.

- In the fifth stage of the project, we encountered direct references to the needs framework developed during the study. To avoid ‘double counting’ evidence, we excluded these references from the evidence register and will continue to do so in future.

Heathrow might have taken alternative approaches to developing need areas to inform its outcomes, however there is risk for bias in both options:

- Firstly, primary research could have been commissioned expressly to develop a set of consumer outcomes. Whilst this might have given up to date and entirely relevant data, it would not have provided the diversity of evidence that has been possible by synthesising a very large evidence base. Taking a wide lens, including a broad range of evidence in terms of methods, samples, research practitioners, will remove any inherent bias associated with a single piece of research.
- Secondly, Heathrow could have conducted its own synthesis internally, drawing on the knowledge base of its insight team. However, this approach could result in outcomes that are influenced by the business rather than purely consumer needs.

The team at Heathrow were at pains not to lead the Blue Marble team’s thinking at any stage, actively avoiding the discussion of likely outcomes or expected themes during the project itself. Instead, the Insight team at Heathrow were available to answer questions throughout but did not enter into discussions about the analysis of the reports.

One potential weakness of the approach taken is that the scope of the analysis is dependent on the body of evidence provided. In the first stages of the syntheses, some topics and customer segments had greater coverage – for instance there was a more of a focus on surface access than any other part of the consumer journey; and several reports concentrated on VIPs and connecting passengers, whereas other customer segments were not singled out in the same way. The iterative process has allowed for gaps to be reported on at each stage to highlight where any facets of the consumer perspective have been underrepresented. For example, having identified in Stage 4 a lack of detailed understanding around the needs of passengers who require support, this was a focus of several of the reports included in Stage 5. The focus of this synthesis exercise has been to identify enduring consumer needs whilst also taking account of developing needs and adjusting the framework accordingly.

## 2. Methodology

The methodology for the synthesis of the research reports used a rigorous and documented process as follows:

- I. **Developing a code frame of needs:** at Stage 1, an initial exercise to read and synthesise c.15 key reports to develop a full master list of themes into which all the specific references to consumer needs could be allocated into. This code frame was the starting point for defining the overarching need areas.

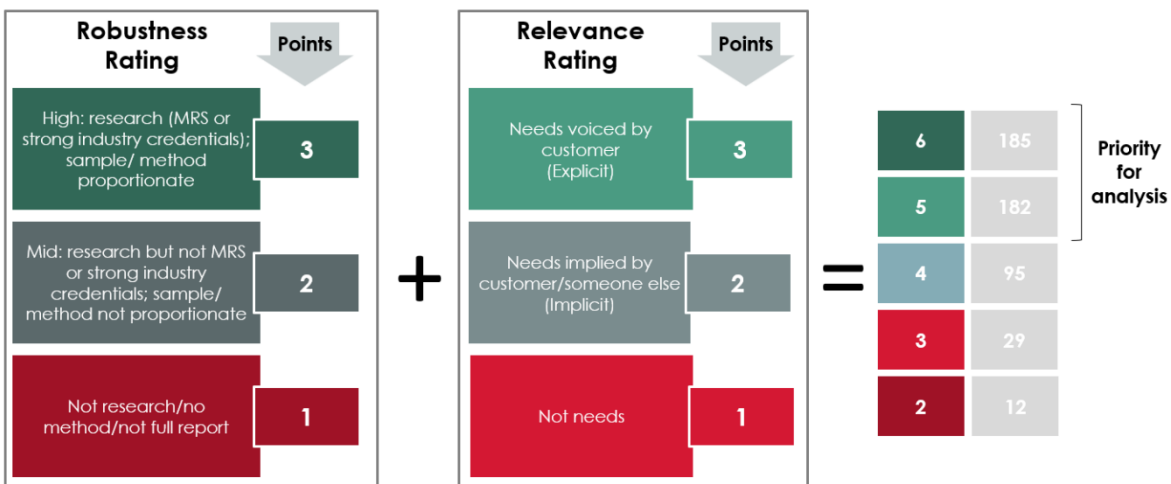
II. **Categorising and evaluating the full body of research** (106 reports in Stage 1; 50 reports in Stage 2; 99 reports in Stage 3; 70 reports in Stage 4; 120 reports in Stage 5; 58 reports in Stage 6)

Every report was reviewed in brief and categorised by:

- Sample, data collection method
- Overarching objective(s)/type of data e.g. needs, performance, experience etc.
- Consumer segments and journey stages covered
- Themes were coded (and when relevant added) to the evolving code frame

The evaluation of each report was based on two factors, as illustrated below.

- A robustness rating based on the quality of the evidence and scored against three levels:
  - high quality research conducted by independent research experts or by industry bodies with strong credentials
  - mid robustness for research where there may be doubts or lack of transparency about either the source or the method
  - reports that did not contain research evidence or where the quoted research was not able to be verified (e.g. think pieces came into this category)
- A relevance rating based on the project brief to understand the needs of airport consumers, again categorised against three levels:
  - high relevance where needs were voiced directly by consumers
  - mid relevance where consumer needs were implied rather than overtly stated
  - low/no relevance



All 503 reports were given a score based on the combined total of the robustness and relevance scores. A total of 185 reports were rated '6' because they contained both explicitly voiced needs

within high quality research reports. A further 182 reports achieved a score of '5': these were either high quality research but where consumer needs were implied in the data – or reports that were highly relevant but less robust in their methodology or provenance.

Reports that scored below a '5' or '6' were still included in the synthesis but more care was taken in how this lower rated evidence was interpreted.

- III. **Analysis and interpretation – developing the need areas:** once all reports had been given an evidence rating at Stage 1, an analysis of the need areas was undertaken to develop the themes within each (and assess the quality of the evidence and any gaps).
  - Each need area was analysed separately, prioritising the reports for detailed review using the code frame and the report evidence rating
  - The full set of themes relating to each need was drawn out and noted
  - The needs and underlying themes were subject to a further review to avoid themes overlapping in different need areas
  - The analysis highlighted how themes within each need area relate to different types of passengers and/or at different stages of the journey
- IV. **Second, third, fourth, fifth and sixth stage analysis and interpretation – checking and challenging the need areas:** the same process of categorisation and evaluation was used with the subsequent tranches of reports and evidence.
  - At each stage, all reports were reviewed against the draft need areas developed in Stage 1
  - Where relevant, new themes and detail were added to the analysis

The process also involved the development of a separate register of all the research sources and how they relate to the need areas, while also giving a shorthand overview of the quality of the evidence.

#### **A note on the quality of the evidence**

The evidence base is made up of reports covering current and future passengers and excludes coverage of cargo owners. The majority of the evidence comprises reports commissioned by Heathrow, conducted by accredited market research agencies. There are also a smaller number of reports commissioned by other industry bodies such as the airlines and the CAA. The evidence base also includes think pieces from suppliers to the industry which may include research data, but which have been published as part of an organisations' own publicity rather than as pieces of empirical research. The body of evidence comprises qualitative and quantitative data, large tracking surveys and small, ad hoc research investigations. It has been possible, therefore, to review consumer needs in depth (qualitative), as well as the prevalence of views (quantitative) from representative samples.

In general, the research team was able to assess the quality of the evidence because there was clear technical explanation of the research design i.e. sample selection and methodology; and the objectives being addressed. It was possible to evaluate the appropriateness of the sample size and method to meet the objectives in question.

As described above, some reports were downgraded as part of the scoring system, particularly where the data and/or the conclusions from the report could not be verified – or where the sampling strategy was assessed to be inadequate.

**The use of verbatim quotations in the report**



A key part of the synthesis has been to develop needs that have the consumer voice at their core. Qualitative research is where we hear consumers express themselves in their own words – and therefore many of the quotes – shown in italics with speech marks – are drawn from the qualitative research reports.

There are also quotes from other reports where the report author is quoted, rather than a consumer directly, and these quotations are shown in normal text without speech marks.

Quotations presented in *blue text* are highlighted for this 6<sup>th</sup> stage and reflect prevailing themes in this wave.

**Key to icons and abbreviations**

Three icons are used within this report:

	TREND: where the evidence is inconclusive or changing because attitudes or behaviours are in flux
	CULTURAL DIFFERENCES: where the evidence shows differences by culture/nationality

Key abbreviations terms used within the report:

**PRS:** Passengers Requiring Support. This term includes consumers who experience any personal circumstances (including physical, cognitive, psychological and sensory) which may require support. These personal circumstances may be permanent or temporary and may be outwardly visible or unseen.

**PRM:** Passengers of Restricted Mobility. This term refers to a subset ‘PRS’ consumers above, referring to passengers who have physical mobility limitations.

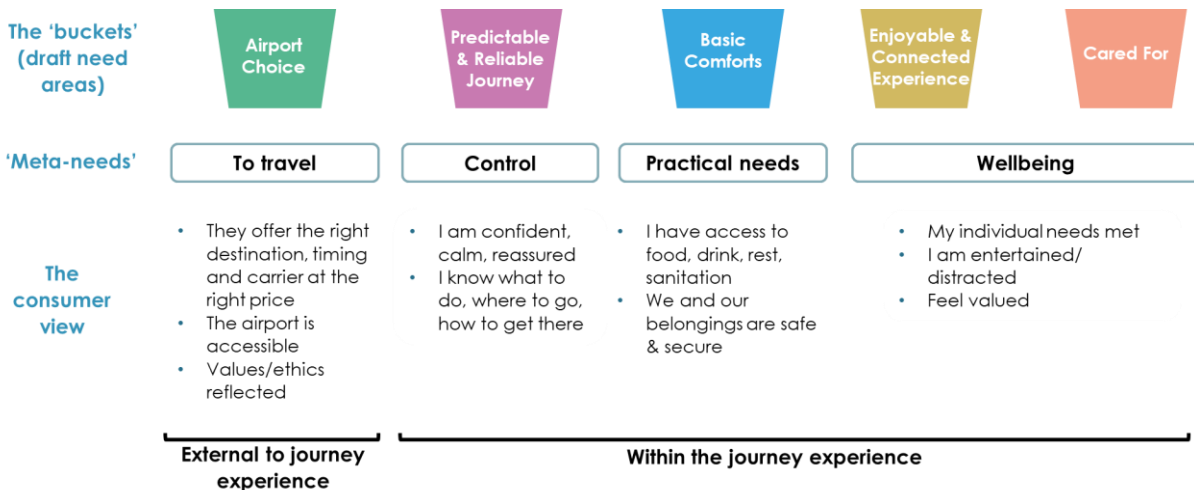
### 3. Overview of need areas

The synthesis and thematic analysis of 503 insight sources has resulted in five ‘need areas’, each of which is described in detail in this report.

These need areas will inform the outcomes and the measures that will underpin them. Outcomes are defined as *‘the over-arching objectives which reflect the most important aspects of an airport’s services that consumers value. They can be defined as high level enduring needs.’*<sup>1</sup>

The need areas have culminated from the analysis of a wide range of evidence, prioritising insights that have been expressed explicitly by airport consumers. This is important in retaining the ‘golden thread’ between how consumers express their needs; and how these needs are met by Heathrow. It has also been important to retain the link to consumers’ voices when labelling the needs.

The diagram below illustrates the five need areas – coined ‘buckets’ for the purposes of the project – alongside corresponding ‘meta-needs’.



The fundamental purpose for people using an airport is *to travel*. ‘Airport Choice’ encompasses the functional requirements for flight destination, route, timing and airport location as well as more emotive needs relating to consumers’ values and ultimately brand choices. ‘Airport Choice’ sits apart from the other need areas as it contains needs that are primarily experienced before the journey commences, and may be linked with prior experiences of travel and specific airports.

To feel *in control* is critical to the airport consumer experience and is reflected in the need area ‘Predictable and Reliable Journey’. Information, signage and wayfinding enable consumers to feel calm and confident throughout the process of moving through the airport.

<sup>1</sup> Principles of outcomes and measures (Draft). Heathrow - June 2018

Consumers also have a long list of needs relating to their *physical and emotional comfort*, including rest, sustenance, shelter, hygiene and to keep themselves and their belongings safe and secure. These needs are encapsulated in 'Basic Comforts'.

A sense of *wellbeing* is the highest emotional state on the hierarchy and is key to two of these 'buckets' which contain higher order needs with the potential to create goodwill and loyalty amongst passengers. 'Enjoyable & Connected Experience' contains the range of needs consumers have to make individual choices, to feel connected to the 'real world' (not in a journey bubble), and for the airport itself to provide a fulfilling experience through its environment and facilities. 'Cared For' centres on the service and assistance across all eventualities that leave consumers feeling supported, cared for and valued.

For each need area the report details the following:

- **An overview of the themes within the 'bucket':** Quotations are used to illustrate the themes either using verbatim from consumers (shown in italics with speech marks) or quoting directly from the report author (shown in standard text)
- **A table showing the evidence found and giving an overall evidence score for each theme, summarising the quality of the evidence for the need area as a whole**
- **A tabulated breakdown of the themes highlighting how these relate to consumer type and journey stage**
- **Evidence gaps:** where gaps from the initial stage have been plugged in earlier stages, and any remaining evidence gaps

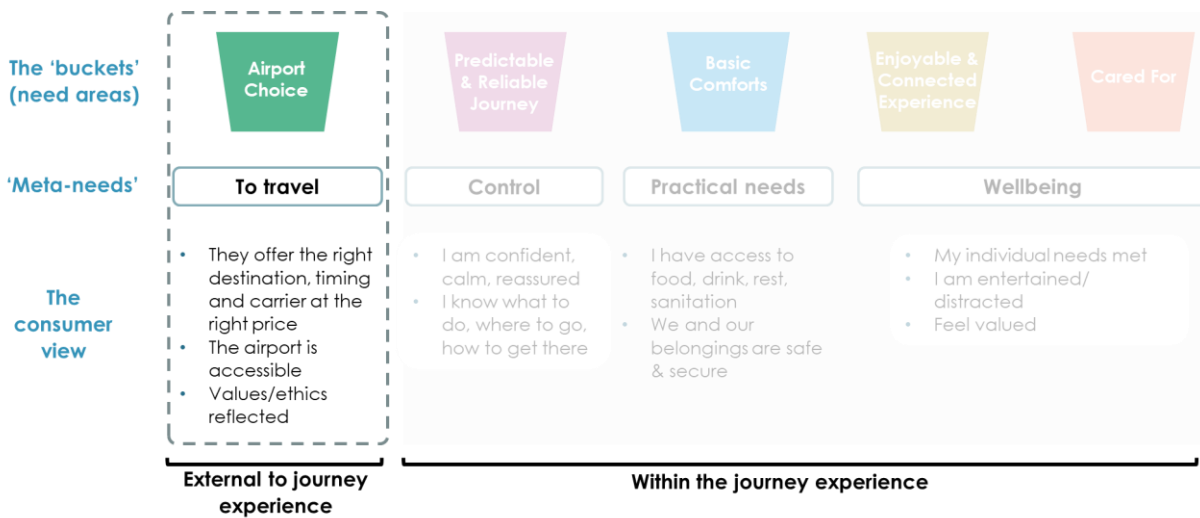
This report covers all six stages of the process to develop and validate a set of evidence-based and consumer-facing need areas that will inform the regulatory outcomes.

### 3.1. AIRPORT CHOICE

#### Introduction

This area centres around needs that must be fulfilled before the journey commences to make consumers feel they have made the right travel plans and chosen the right airport. From the consumer perspective, this need area can be paraphrased as:

***‘An airport choice that enables me to fulfil my travel plans’***



The themes in this need area are mainly practical, relating directly to whether the airport fulfils passengers’ core functional requirements such as flight destination, route, times, budget etc. In addition, it includes more emotive needs relating to passengers’ ethical outlook and brand perceptions (which do not tend to be ‘top of mind’ for most people).

The needs covered in ‘Airport Choice’ apply when consumers are considering and making their travel plans, including flight and surface access. There is also evidence that previous passenger experience of an airport (e.g. familiarity with the airport environment and facilities) can have a significant influence on booking decisions. Hence, needs in this area are distinct from those relating to passenger experiences of the journey itself, but may be informed by previous first-hand experience or perceived impressions of the airport.

At Stage 1 of the synthesis, this area was the least conclusive given a low volume of direct ‘voice of the passenger’ evidence. Stages 2 and 3 provided a much more robust analysis based on the addition of over 70 high quality additional reports. Stage 4 supplied evidence of a new need relating to facilitating COVID-19 requirements enabling travel. In Stage 5, which predominantly featured evidence from the ‘New Normal’ phase after Covid was no longer a consideration, the focus of this specific need changed to facilitating travel through the provision of add-on services, enabling

passengers to exert greater in control of their journey. This need was therefore resituated within ‘Predictable and Reliable Journey’. Several other COVID-related needs also fell away, including for free cancellations, enhanced hygiene measures and information about COVID-specific processes and requirements. Following these significant shifts, Stage 6 indicates a clear stabilisation of passenger needs, with no structural changes to this bucket or the broader framework in this wave.



Some needs within this theme continue to be accentuated by cost-of-living pressures, which may lead consumers to reflect on the type and frequency of trips they take, with an increased focus on affordable travel. There is also evidence to suggest that new processes and services which support frictionless travel are starting to become a point of differentiation for airports and may influence choice.

‘Airport Choice’ needs are broadly applicable to all passenger groups (with some exceptions, for example those travelling on business and VIP passengers, who often do not book themselves and for whom budgetary constraints are less of a feature). The strength of the different needs can vary by passenger type (for example by affluence/budget, experience).

## Overview of the themes identified within ‘Airport Choice’

The themes within this need area fall into four categories:

**A. An airport that can fulfil desired travel plans.** This category includes three themes: ‘Enables good value and affordable travel’, ‘An airport I can access’, ‘Offers flights I want and when I need’.

1. ‘Enables good value and affordable travel’: encompasses the cost of all the services involved (flight, travel to airport, value associated with the airport facilities etc.) Specifically, the affordability of the flights is a driver for airport choice – as are the surface access related costs, especially for travellers who are familiar with these from their previous experiences. It does not however explicitly relate to the airport passenger charge, rather the costs that are visible to the consumer.
  - Cost remains top of mind in Stage 6, and there is continued evidence that affordability is shaping both travel behaviour and intention. As in the previous stage, some consumers are willing to trade off convenience (e.g. airport choice, timings) to secure better value, and affordability remains the most cited barrier to flying. Drop-off fees and parking are commonly seen as expensive, and in some cases unfair, contributing to reduced satisfaction and trust – and in some cases, a preference for an alternative mode of transport as a point of principle, even if it is more expensive. Affordability continues to be particularly important for families and younger travellers, with cost pressures more acutely felt among these groups and influencing airport choice, including shifts towards cheaper alternatives. A few reports note

that consumer economic confidence appeared to stabilise towards the end of 2025, with some early impact on travel attitudes; the full impact on affordability-related needs may become clearer in Stage 7 of the synthesis. It should also be noted that while some passengers are cutting back in discretionary areas, there is increased evidence of a polarisation of spend, with sustained willingness to pay for services that enhance the journey by saving time, reducing friction and improving comfort, such as lounges and fast track, as seen in later codes.

Cost is an influencing factor on where consumers fly from – but cost means more than the ticket price.

**What matters to passengers – Qualitative research findings Nov 2017.**  
**Caroline Thompson Associates**

62% of passengers say they are more concerned with finding a good value offer than finding the cheapest price in air travel.

**Final Literature Review 2017**

With the wider economic landscape squeezing disposable income, cost is becoming a more significant barrier to travel. With this in mind, some are considering changing the frequency and type of holidays they chose, for example those with more available time, such as empty nesters, may opt for more frequent, shorter-haul flights rather than long-haul flights.

**Impact of COVID-19 research. CAA. 2022**

Loss aversion among consumers appears to have been accentuated by the pandemic and this trend will likely continue in the context of the cost of living crisis. This is particularly evident in the planning and booking stage as people have lost trust in airlines and fear the impact of changes.

**Impact of COVID-19 research. CAA. 2022**

*‘Arrival experience at Heathrow good - except the £5 drop off fee does still feel like a money grab with little choice and not becoming of a “premium” airport like Heathrow’*

**Passenger Expectations Post COVID-19 Ethnography. Horizon. 2022**

Public sentiment drops this quarter due to the £5 drop-off fee... and concerns over the ULEZ expansion.

**Heathrow Reputation Tracker - Q1 2023**

75% of UK-wide respondents [as at April 2023] cite that the 'price of the flight' influences their decision as to which UK airport to choose. (Blue Marble commentary)

### **Heathrow Travel Behaviours Survey Savanta W15 Exec Summary**

The cost-of-living crisis is forcing many to become savvier with their budgets: two-thirds of Americans say inflation will influence how they travel this year (RetailMeNot, 2023), while 23% of Europeans are concerned about rising trip costs. Cost-cutting measures include travelling off-season, opting for more affordable destinations and hunting for last-minute deals.

### **future-traveller-cohorts June 2023**

Price of travel is now the biggest barrier to flying, with 7 in 10 not planning to fly citing a financial reason for not doing so.

### **Consumer Insights from YouGov Travel Profiles. 2023**

According to McKinsey survey data, 52 percent of Gen Zers say they splurge on experiences, compared with only 29 percent of baby boomers.

And Gen Z travelers say they try to save money on flights, local transportation, shopping, and food before trimming their spending on experiences.

### **The Evolving Role of Experience in Travel**

The cost of flying remains the most widespread priority for consumers, with 52% rating it as their top concern. Over half of passengers also reported making use of lower cost options such as choosing a less convenient flight time or travelling with hand luggage only. Despite this inconsistency and the potential for unexpected costs, overall satisfaction with value for money is high (76%) and has returned to levels last seen before 2022, following a period after the pandemic when value for money ratings were lower.

### **cap3213-annual-consumer-survey-savanta-flying-in-2025-and-beyond. 2025**

Affordable ticket prices, reasonable parking fees, and the overall cost-efficiency of traveling from specific airports are important considerations for families planning trips.

### **Heathrow brand performance tracker wave 3. 2025**

Budgetary constraints are the most frequently cited barrier to flying across all age groups. However, these concerns are less pronounced among older consumers (29% of 55+) compared to younger consumers (41% of 18-34).

**cap3213-annual-consumer-survey-savanta-flying-in-2025-and-beyond.  
2025**

2. **‘An airport I can access’:** Accessibility remains a fundamental driver of airport choice. As seen in the previous stage, passengers prioritise airports that are easy to reach from home or destination, including at the required time of day. Stage 6 continues to show that ease of access, particularly via public transport, is a top-tier driver, alongside airline preference, but that some consumers are willing to travel to less conveniently located airports to save money. As before, this is especially important for families, where easy access helps reduce travel stress. Evidence in Stage 6 emphasises the importance of reliability and simplicity, with passengers favouring options that minimise changes, feel predictable, and have worked well previously. There is also stronger evidence that accessibility can act as a barrier to travel, particularly for those with physical or non-physical conditions, reinforcing its role in airport choice as a means of enabling travel altogether.

For terminating passengers...location/accessibility of the airport (was one of the) primary reasons for choosing to fly at a certain airport.

**CAA Passenger Research: Satisfaction with the Airport Experience**

*‘8 miles from Heathrow, time by public transport 2+ hours, 36 miles from Gatwick, half the time by public transport.’*

**Horizon Report Surface Access October 2018**

*‘Flights arrive late so I have arrived at midnight and been left with it costing me a lot of money to get home. I would use services a lot more if there were an earlier start/later finish to Heathrow Express and Tube.’*

**Surface Access Report v2.0**

*‘The cycling and rail infrastructure is atrocious. On cycling: we need proper, secure, bike storage lockers like some train stations have. I do not feel comfortable leaving my road bike in the bike racks you have. We need proper cycle-ways (off road where possible). On trains: not everyone wants to go from/to London. We need a rail link to connect to the South-Western Railway network to Woking or similar.’*

**Horizon x Human8 - Sustainability Plan v2.0 (2).pptx**

66% of UK-wide respondents [as of April 2023] cite that whether or not the airport is 'easy to get to from home or work' influences their decision as to which UK airport to choose.

**Heathrow Travel Behaviours Survey Savanta W15 Exec Summary.pptx**

Price and ease of access are the most important drivers of airport choice, with destination and time of flight rounding the top 4.

**UK Consumers Brand perceptions of Heathrow - Overview Pack 2023.pdf**

*'I chose this flight because London Heathrow offers good connection options, reliable airlines, and a smooth transit experience.'*

**Heathrow\_Connection research\_Presentation\_sent 170425**

Ease of access is A top tier preference driver for both the category and Heathrow.

**Heathrow Brand Tracker presentation - July 25.pptx**

Families value easy access to airports, quick check-in processes, short queues, and proximity to home. These elements help to minimize travel stress and ensure a smooth journey.

**W3 2025 Heathrow\_Brand Deep Dive Presentation\_  
v3\_ClientUseOnly09.02.26**

3. 'Offers flights I want and when I need': Fulfilling travel needs also means choosing an airport which flies to the destination a passenger wishes to go to – and with a flight schedule that fits their needs. There is evidence that this is a particular consideration for Connecting passengers, who are carefully balancing efficiency and comfort – aiming to allow enough time for stress-free navigation of the airport, but without lengthy layovers, or to divide the journey into palatable travel periods. It can also relate to choosing a preferred airline – a differentiator which is of increased importance for business and premium fliers. As explained above, in Stage 6 there is continued evidence that financial pressures are driving some consumers to be more willing to take flights at less convenient times in order to save money.

Consumers have clear airport perceptions and preferences, but finding the right flight is the overriding aim.

**Heathrow Surface Access – Final Report**

*'I fly from Stansted because of the price and it's not too difficult to get to and it goes to more destinations and they've got slightly better times as well.'*

**Coach and Airports Research Debrief June 2018.pdf**

63% of UK-wide respondents [as of April 2023] cite that the 'time of the flight' influences their decision as to which UK airport to choose and 41% cite 'availability of destination' as a factor.

**Heathrow Travel Behaviours Survey Savanta W15 Exec Summary.pptx**

The factor most frequently cited by passengers as potentially enhancing the booking experience is the availability of better flight options, as indicated by 19% of respondents.

**passenger-it-insights-2023.pdf**

Convenient departure/arrival times, travel time and number of layovers are the top three reasons that would persuade passengers not to choose the cheapest available flight.

**2023+IATA+Global+Passenger+Survey+-+Report.pdf**

*'We love connecting through Heathrow because It's like a 10-hour flight from Chennai. And then a 9- hour flight to Atlanta. We get a break in the middle rather than if we connect in The Middle east, it's a 4- hour flight from India and then it's a 16-hour flight. We prefer breaking it in the middle.'*

**OSS Draft Report Waves 1-3 25 March 2025**

Passengers choose their regular departure airport based on location (65%), travel time (33%), fare price (26%), and airline availability (24%).

**IATA\_GPS\_2025\_Report**

Among premium ticket fliers, range of services in the airport is a differentiating factor along with airline and destination range.

**Heathrow Brand Tracker presentation - July 25.pptx**

Wide range of destinations and airlines are the most prominent reasons business fliers chose Heathrow.

**W3 2025 Heathrow\_Brand Deep Dive Presentation\_  
v3\_ClientUseOnly09.02.26**

*"I did not select London Heathrow because while it does offer a large variety of airlines and destinations, I feel there could be a wider selection of direct flights to more diverse location."*

**Heathrow Brand Tracker\_Wave 5\_Presentation.pptx**

**B. Trust it will deliver:** This category includes four themes: ‘Believe will be reliable and safe’ ‘Brands for me’, ‘Clear and comparable information, and ‘Familiarity’:

1. **‘Believe it will be reliable and safe’:** A foundation of trust is believing that the airport represents safety and reliability. Safety is largely taken for granted - of ‘paramount importance’ but not top of mind when planning travel. Reliability is specifically associated with operating without delays or cancellations. Evidence in Stage 6 suggests this is of particular importance for business and connecting passengers. Building on evidence from the previous wave that the March 2025 power outage raised passenger concerns over risk assessments and business continuity planning, one report in Stage 6 indicates that trust - a top 5 driver of preference - has declined as a result. Other incidents across London airports, such as a pepper spray attack, cyber-attack and lounge fire have also highlighted the importance of this factor on airport choice.

*‘The least stress possible. You worry about getting there on time, and if the flight’s delayed, or if it’s cancelled.’*

**WP05 Heathrow Airport Customer Valuation Research. Systra**

Reassurance means ‘I am confident I will make the flight on time and there will be minimal stress’.

Key theme to drive excellent experience: ‘A trusted and consistent brand which delivers a stress-free experience’.

**Brand Tracking – Runway Phase (TNL) – Qual Findings FINAL**

*‘Knowledge in advance of all the things (the airport) has put in place to deliver a safe environment for me to travel from and to.’*

**Horizon Report – Passengers Priorities post COVID-19 19 report June 2020.pptx**

*‘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’*

**Passengers Priorities Post COVID-19 19 - Wave 3. Horizon. October 2021**

UK Safety remains paramount for passengers, evident from the steadfast top-ranking of “Maintaining a safe & secure airport”.

**Horizon x Human8 - Sustainability Plan v2.0 (2).pptx**

Passengers are hesitant whether they would actually use the eVTOL aircraft. Price is the biggest barrier (it's more expensive than anticipated), but infrastructure, sustainability, and safety concerns are present.

**eVTOL - Mar 2023.pptx**

*'I tend to choose to travel through Heathrow Airport – they offer the flights I need, and I trust that they will deliver the experience I want.'*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

*'Apparently the risk of such a fire and its effect on the airport had been pointed out before but nothing was done so the airport should have put into place specific coping measures to alleviate the disruption well beforehand.'*

**Heathrow Brand Tracker\_Topline\_V2\_IntUseOnly**

Trust perceptions for Heathrow have declined since Nov'24, likely related to March power outage & possibly expansion announcements in Jan/Feb [...] It's an airport I can trust' is a top 5 driver of preference.

**Heathrow Brand Tracker presentation - July 25.pptx**

People who don't select 'it is an airport I trust' call out reasons such as the power outages affecting their views. Also flight cancellations.

**Heathrow Brand Tracker\_Wave 5\_Presentation.pptx**

Positive AIRPORT sentiment declined at year end, driven primarily by Londoners FOLLOWING recent highly publicised situations: Pepper spray attack at T3 (Dec '25), Cyber attack leading to check in systems issues (Sept '25) - impact lasted several days with delays at check due to manual offline processing, Lounge fire at Stansted causes travel chaos (Sept '25)  
Expansion decisions contested (Nov 2025)

**W3 2025 Heathrow\_Brand Deep Dive Presentation\_v3\_ClientUseOnly09.02.26**

However, those travelling 'short haul' for business &/or for connecting flights are often most time conscious. Risk of disruption / loss of convenience encourages use of alternative airlines / terminals / airports esp. amongst frequent flyers who know their options.

**Final Heathrow T4 Parking Research Yugen Research.pdf**

2. 'Brand(s) for me': the airport brand and the brands associated with it (airlines, trainlines, retail brands) can build the belief that the airport is a good or desirable choice. For some international consumers, a globally respected airport with international stature can be a key driver for airport choice.

Many perceive Heathrow as a 'facility' rather than a 'brand' and take little or no interest in its activities, beyond perhaps taking a passing interest in media coverage relating to runway expansion plans.

**WP05 Heathrow Airport Customer Valuation Research. Systra**

15% of heterosexual audience / 16% of LGBT audience see 'reputation of the airport' as an influencer on airport decision.

**LGBT Overview**

A low-cost carrier terminal at Heathrow would need to retain consistency in service, tailored retail and F&B and even better surface access options to ensure it supports Heathrow's vision of 'best airport in the world'.

**Low Cost Carriers Report v1.0**

For most, Heathrow represented a microcosm of London which was overwhelming, scary and corporate for some, yet cosmopolitan, dynamic and exciting for others.

**Brand Tracking – Runway Phase (TNL) – Qual Findings FINAL**

Although Heathrow branded parking is generally seen to come at a price, there is a greater sense of trust as it is a large company with higher customer expectations and more of a reputation to lose.

**Heathrow Surface Access Insight Summary 2019**

*'It is my airport of choice for the airline brand and destinations I most frequently use.'*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

20% of UK-wide respondents [as at April 2023] cite that the 'reputation of the airport' influences their decision as to which UK airport to choose.

**Heathrow Travel Behaviours Survey Savanta W15 Exec Summary.pptx**

Example of why people don't feel it's a brand for them: *"View Heathrow as more a business and higher cost airport, whereas I am more cost conscious and mainstream."*

### Heathrow Brand Tracker\_Wave 5\_Presentation.pptx

3. 'Clear & comparable information': having clear and comparable information with which to make decisions about travel arrangements to and from the airport, to inform about the airport services, processes and facilities, to enable comparison of flight price (and schedule) options and about the rights of passengers. At the point of booking, consumers also want information concerning additional costs later in the booking process or journey, frequency of flight disruptions at the airport and measures taken to promote aircraft safety. In Stage 6, there is continued evidence that passengers want clear, consolidated and easy-to-access information prior to travel, with a strong emphasis on having all relevant details in one place and via preferred digital channels. This need is particularly significant for PRS/PRM passengers, who require more detailed, tailored information to plan their journey with confidence, and families, who value accessible, well-organised information to reduce complexity in their travel. Transparency remains important, particularly around what is included versus optional and any additional costs.

58% look for information about transport options to/from the airport in the period between researching a flight and shortly after booking. Live information is increasingly expected, and people currently use a variety of resources, ranging from live Google maps, Rome2Rio and review sites. TripAdvisor tips seemed more popular with UK passengers. Many passengers (38%) expect Heathrow to provide this [type of] information.

#### **Horizon Report Surface Access October 2018**

Almost all passengers decide on mode of travel at least a week before the flight. Around a half make decision on mode of travel at same time as booking the flight.

#### **Heathrow Transport Focus Surface Access to Airports FINAL Report 29-08-18.pptx**

Consumers expect more price transparency and are more likely to compare many offers to achieve the best experience.

#### **Final Literature Review 2017**

*'I have no idea what to expect, from checking in, to lounge access and boarding it all seems to be a secret that the airports and airlines want to keep to themselves. Ok, they advertise, 'we are back', 'things returning to normal' (whatever that is in 2021) but lack the practical and useful advice/support.*

#### **Travel and Airport Experience Expectations. Horizon. Sept 2021.**

When travel planning a clear improvement area is 'access to information in one single place' and 'clarify and transparency on the offer content'.

**Global Planning Survey. 2022. IATA.**

One clear improvement area when planning travel was needing access to information in one single place, plus clarity and transparency on the offer content, during the booking and planning phase.

**global-passenger-survey-2022-media-briefing**

Passengers mostly expect to hear about [the rewards] feature digitally... The data reveals a strong preference for digital channels (email, app, website) among passengers.

**Heathrow Rewards Sharing- Aug 2023.pptx**

Most consumers would like more information at the point of booking around costs. Specifically, seven in ten (69%) consumers would like more information around all costs that could arise later in the booking process or travel journey.

This may suggest a wariness around 'hidden' costs amongst the public.

**Aviation Consumer Survey - Wave 13**

Facilities increasing Heathrow's suitability for Family flyers: Digital Family Hub on Heathrow app (for pre-travel planning)

**W3 2025 Heathrow\_Brand Deep Dive Presentation\_v3\_ClientUseOnly09.02.26**

'It is easy to find information I need before and during travel' is a top 5 driver of preference for London / South-East participants

**Heathrow Brand Tracker presentation - July 25.pptx**

4. 'Familiarity/habit': this theme arises from evidence that shows that previous experience of using the airport - or knowing the reputation of the airport experience - is a key driver in choosing an airport, and the mode of transport chosen to get to and from it as it alleviates anxiety of the unexpected.

Frequent flyers often claim to be more likely to avoid an airport than actively choose one.

**Heathrow Connections Research Alex Walley**

53% UK / 71% Overseas say 'my knowledge of/comfort with the airport' is important in airport choice.

**Heathrow Access+Emissions Charge Research Final Report Feb 2019**

Flying behaviours are strongly ingrained, so any immediate effect from information alone is likely to be small.

**CAP2205 - CAA\_Environmental Information Provision\_Final  
Report\_070421.pdf**

Established issues and habit are key factors in determining travel patterns to the airport'

**Surface Access Survey Q3. Horizon. 2021.**

*'I generally have plenty of choice. I know where everything is and can rely on smooth operations even when there are issues outside of their control. Plenty of parking options, shopping and sustenance options. Good availability of information via their app too.'*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

'Experience: preference for certain airports based on past experience' is part of the decision-making process when choosing which airport to fly from:

*'I won't do Stansted, it's a real dump!'*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

*'I'll always be anxious when I know I'm gonna fly. But at least, with Gatwick, I know what to expect, [...] whereas because I didn't know what to expect at Heathrow, it heightened it, definitely.'*

**PRS Barriers Research - Research findings debrief - December 2024**

Top rank factors impacting family flyers' airport choice: Prefer this one airport.  
**W3 2025 Heathrow\_Brand Deep Dive Presentation\_ v3\_ClientUseOnly09.02.26**

**C. Reflects my values:** This category includes two themes: 'Environmental responsibility' and 'Socially responsible'

1. **'Environmental responsibility':** Environmental responsibility' relates to expectations for airports to operate in an environmentally responsible way, including visible sustainability initiatives, clearer communication of environmental efforts, and enabling passengers to make more sustainable choices (e.g. carbon offsetting or greener options).

In Stage 5, there was a broad body of evidence pointing to growing awareness and interest in sustainability, including a desire for more transparent information and some willingness to engage with initiatives, particularly among younger passengers. In Stage 6, however, there is a more limited evidence base for this theme, with fewer environment-focused

reports contributing to the synthesis. Within this context, there is some evidence that passengers want airports to demonstrate credible, visible sustainability action, with a preference for this to be embedded into the journey rather than requiring additional effort. While much of the stronger evidence relates to airline behaviour, it suggests a broader expectation that sustainability should form part of the overall travel experience, including at the airport. However, this remains a secondary need, with cost and convenience continuing to take precedence, and engagement varying across segments. There is also ongoing scepticism where initiatives lack transparency or clear evidence of impact. This remains an area to monitor in Stage 7 given the more limited evidence base in this stage.

Participants relied on assumed knowledge of an airline's environmental credentials - BA, for example, was assumed to have decent credentials, but due to overall brand perceptions and that it performs well in other areas. Similarly, environmentally conscious behaviours were not associated with airlines like easyJet due to the low cost.

**CAP2 CAA\_Environmental Information Provision\_Final Report\_070421.pdf**

Two-fifths of respondents (39%) agree or strongly agree that they would pay more for flight tickets to reduce the environmental and / or noise impact of flying. This figure represents a continuation of the steady wave-to-wave increase seen since tracking began and is nearly double the figure recorded in March 2017 (22%).

**CAA Consumer Survey Wave 10 Autumn 2021 Environment Report.pdf**

*'I don't really pay too much attention to environmental impacts to be honest. Its more about the factor of being quite young and not being absolutely loaded. So when I do try to have a holiday or something I look for the one that's most cost efficient. Doesn't really cross my mind to look at the environment.'*

**CAP2205 - CAA\_Environmental Information Provision\_Final Report\_070421.pdf**

There was also some concern that all of this is simply greenwashing – empty talk with little follow through, so it's important that Heathrow design a sustainability plan that meets passenger expectations and delivers on the goals it contains in a way that is transparent and understandable to passengers.

**Heathrow Horizon 2.0 Exploration final report April 2022.pptx**

Global consumers are becoming increasingly aware of the impact of their lifestyle choices and showing more willing in adopting sustainable and eco-friendly routines. According to ACI World's ASQ Global Traveller Survey 2023 globally, 72% of travellers expect to see a green environment at airports and 43% of respondents have heard of sustainable aviation fuels, showing an

increasing awareness and consciousness of the role that airports play in global carbon emissions and an interest in how they are working with stakeholders to tackle emissions.

**IAR Trend Report 2024.pdf**

76% of global travellers said they wanted to travel more sustainably over the coming 12 months. Nearly half (49%) of international travellers believe sustainable travel is too expensive, in contrast to 43% willing to pay extra for options with a sustainable certification. Globally, 42% travellers would be encouraged to travel more sustainably if they were offered free perks or discounts through booking sites.

**future-traveller-cohorts June 2023.pdf**

19% of respondents did not plan to fly for leisure in 2023. Of these, 19% cited 'I am trying to reduce my carbon footprint'.

**Horizon- Future Look to 2023 .pptx**

*'Create me a scheme which allows me to opt into a variety of green initiatives which I contribute to based on my travel choices. Bring it to life, telling me that my business class flight to JFK will 'cost' me 'X', however that money will go to doing A, B or C. Real life examples which I can look at online. Link it to every airline which flies into LHR so that every passenger gets the chance to do something. I can see my online carbon account and have the ability to add in other forms of transport, home heating and fuel usage, my car etc plus start considering other things to include maybe such as entertainment, shopping.'*

**Carbon Offsetting Concept Report v1.0- Debrief.pptx**

Participants express concerns about the environmental impact of flying but struggle with information gaps on sustainable practices. Additionally, 63% find it harder to maintain sustainability when travelling. The lower adoption of flight-related sustainable actions could be linked to perceived difficulties in accessibility and understanding of how to act sustainably

**P044119 - Heathrow Sustainability Perceptions - Report v1 30.04.25**

Attitudes towards the environment are similar to those seen last year, with widespread concern about the environment, but relatively few consumers willing to fly less or pay more to offset the environmental impact of flying. As seen last year, consumers tend to see paying for environmental measures as the airline's responsibility rather than their own. Younger consumers clearly care

about the environmental impact of aviation, but results suggest that the affordability of flying may be of greater importance to them.

**aviation-consumer-survey-wave-13 (1)**

Just 13% of consumers who have flown previously say that they have paid to reduce or offset the environmental impact of their most recent flight, the same proportion as in 2023. It also continues to be the case that younger recent flyers (aged 18-34) are significantly more likely to say they paid to reduce or offset the environmental impact of their last flight (21%). Older age groups are therefore more likely to say they haven't done this. But it is notable that older and digitally less confident consumers are also significantly more likely to say that they are unsure whether they did this or not, which may suggest barriers to awareness of these options during the booking process.

**aviation-consumer-survey-wave-13 (1)**

Users are comfortable with and supportive of environmental initiatives - There is no evidence of resistance or trade-off concern. Environmental responsibility is an expected baseline rather than a motivating factor.

**Heathrow Acceptability Testing Technical Report - 05.02.26**

Sustainability is not seen as the airport's core purpose... travellers believe airports should focus on supporting tourism, creating jobs, and investing in transport infrastructure.

**2026-ACI-ASQ-Global-Traveller-Survey-Report**

The qualitative work indicated there was very little understanding of the CAA's environmental remit and this was felt to be much less important than the other aspects of its role, reflective of the low personal priority most appeared to place on the issue relative to the other aspects of the CAA's work.

**CAP1303ConsumerresearchfortheUKaviationsectorfinalreport.pdf**

2. 'Socially responsible': The synthesis has included evidence about the need to see an airport's social responsibility e.g. for its communities and local population, championing disability and as an employer. In Stage 5 we heard that some, particularly younger, travellers express interest in the measures airports take to support accessibility, diversity and inclusion, and initiatives to minimise the impact of noise, road traffic and air pollution on communities living near the airport. There was related evidence in Stage 6, with reports citing interest in airports demonstrating the social impact of their operation, including supporting communities by enabling local tourism, providing jobs, investing in transport infrastructure and promoting

local products. As in previous stages, social responsibility is a key element in the discussion around potential expansion of Heathrow Airport.

The social model of disability - stating that a person is not disabled, an environment imposes disability - is now a widely used framework for change towards inclusivity and empowerment. This concept of 'human first' is a growing trend.

#### **Terminology at Heathrow report - August v1.0**

YouGov data shows that almost half of all consumers across 43 countries (46%) like it when brands get involved in social issues, while more than two in five consumers worldwide (44%) say they try to buy only from socially and environmentally responsible companies

#### **YouGov-Travel-Brand-Destination-Rankings-Report-2022\_Final.pdf**

Those living in communities close to Heathrow have more concerns about the impact of Evtol aircraft on the local area and the local airport. Their concerns mostly relate to additional road traffic causing added congestion, disruption and parking difficulties. The thought of numerous low-flying aircraft causes concerns about visual & noise pollution, and erosion of privacy.

#### **eVTOL - Mar 2023.pptx**

Regarding the proportion of those who would like to see more information in the following areas at the point of booking a flight:

- 32% for 'Measures taken to promote accessibility'
- 25% for 'How well the airline reflects and supports diversity and inclusion'
- 14% for 'The gender pay gap of the airline'

#### **aviation-consumer-survey-wave-13 (1)**

Today's travellers expect airports to go beyond large-scale pledges by

demonstrating the environmental and social impact of their operation, including supporting communities, promoting local products, and reducing waste in ways passengers can experience and verify.' [...] Support local and regional tourism (49%) is a top answer for airports' role in supporting their local communities, followed by Create jobs at the airport (42%); invest in transport infrastructures (better connection to public transport, better parking, etc.) (32%)

## 2026-ACI-ASQ-Global-Traveller-Survey-Report

Reasons why people oppose Heathrow runway expansion: 72% cite concerns about the destruction of homes and communities, while just under that (68%) say long term air quality is an issue.

**Heathrow Local Communities Report v4.pdf**

**D. Perceptions of airport experience:** This category focuses on how consumers may choose an airport because they believe their experience will be better there.

1. 'Differentiating / memorable facilities, environment or service': Choice of airport can be influenced by consumers knowing about or having used facilities that elevate the overall experience in some way. Examples in Stage 5 included CT scanning technology improving the security process; electric vertical take-off and landing aircraft offering a 'cool' new way to access the airport; a 'One-Stop Security' process for Connecting passengers; and 'emotionally engaging' experiences creating a sense of differentiation.

In Stage 6, there is continued and more widespread evidence that differentiating features can influence airport choice, particularly as a secondary driver between otherwise comparable options. While cost and convenience remain primary, experience-led elements such as entertainment, atmosphere and a strong sense of place can create a memorable journey and positively shape perceptions. Facilities such as shops, food and drink and lounges remain important in reinforcing this, particularly for premium and business passengers. In the most recent waves we are seeing this code pertain to airport processes and services that result in a smoother, less stressful journey; for example autonomous wheelchairs which enable independence for PRS/PRM, or removing the requirement for connections to undergo secondary screening process. There is some evidence of cultural differences in expectations, for example Chinese passengers more expectant of 'extreme convenience' and Americans particularly valuing time efficiency.

There is an appetite for the eVTOL aircraft. It's exciting, new, and a cool technology, it would help to avoid traffic delays and seems to be convenient and time efficient. Passengers expect most potential for work and business-related use cases, whereby they don't need to pay themselves, or for travelling to places with currently limited infrastructure.

Shops, restaurants, atmosphere, entertainment, check in facilities, lounges are 'nice to have' factors - these can elevate the experience; currently are secondary but becoming more important.

**Brand Tracking - Runway Phase (TNL) - Qual Findings FINAL**

Heathrow currently performs well on several of the functional drivers to airport choice. The areas where Heathrow pulls ahead of Gatwick align with Heathrow's current market identity: premium, global and open to the world.

**Heathrow The Market Landscape\_Brand&Attitudes Tracker\_041218.pdf**

*'Obviously at an airport the point is you go through to get to your plane, but I think if you can remember your experience at the airport, you'll probably want to go there again.'*

**Designing an Airport for Future Generations - Debrief FINAL SHARED**

More precisely, the comfort of the passenger journey can be supported by fulfilling basic needs such as providing Wi-Fi, chargers, and clean washrooms, or by offering an emotionally engaging experience. While the first option has become a point of parity between airports, providing an engaging experience can be developed as a point of differentiation in the industry.

**ASQ-2023-Global-Traveller-Survey-Report.pdf**

When made aware of the [CT scanner] trial, the impact on perceptions of Heathrow is positive too. Helps to offset previous poor Heathrow experience (which some reported). Feels like Heathrow is being modern/ proactive.

**T5 Security trial report 27 June 23- Caroline Thompson.pptx**

*'Coming through London would now be amongst my preferred choices.'*

**OSS Draft Report Waves 1-3 25 March 2025**

Automated wheelchairs in theory are a good investment for Heathrow, and users of wheelchair assistance appreciate that Heathrow is looking at innovative ways to support their needs. *"After watching the video, I feel really hopeful and excited about what travel could look like in the future with autonomous wheelchairs. I can imagine arriving at the airport with my loved one, who has mobility challenges, and being greeted by one of these smart wheelchairs. Instead of waiting around for assistance or struggling to push a manual chair through a busy terminal, we'd simply help them get comfortably seated, set the destination on the screen, and let the wheelchair do the rest."*

**Horizon x Human8 Autonomous Wheelchairs Final**

Concept of Heathrow hosting a season of events impresses passengers who recognise 'Summer Sounds' as a customer-centric investment. Many

subsequently cite Heathrow as delivering a superior CX vs. other international airports.

**Heathrow Summer Sounds 2025\_Research Findings\_31.07.25.pptx**

Among premium ticket fliers, range of services in the airport is a differentiating factor along with airline and destination range.

**Heathrow Brand Tracker presentation - July 25.pptx**

84 percent of [connections] passengers are more likely to use Heathrow again when secondary screening is not required, with 62 percent indicating the highest likelihood. The service provided will most likely lead passengers to connect through Heathrow again in the future. This is also reflected in the passengers' open answers.

**T3 Short Connections - Overview Report.pptx**

Listed below are the reports which provide the insight for each theme, and the evidence score, which gives an indication of the overall strength of evidence.

'Airport Choice' Themes:	No. reports with supporting evidence	Evidence score *
<b>Can fulfil desired travel plan</b>		
• Enables good value and affordable travel	156	792
• An airport I can access	100	530
• Offers flights I want and when I need	84	442
<b>Trust it will deliver</b>		
• Believe it will be reliable and safe	76	400
• Clear and comparable information	66	346
• Brand(s) for me	54	276
• Familiarity / habit	33	183
<b>Reflects my values</b>		
• Environmental responsibility	92	443
• Socially responsible	37	181
<b>Perceptions of airport experience</b>		
• Differentiating / memorable facilities, environment or service	46	248

\* The evidence rating assigns a value to each report based on the 'quality score\*\*' for that report. The values for all the reports contributing to each theme are then added together to provide the evidence score.

\*\*The quality score is based on the rating of robustness and relevance for the report content - detailed in Methodology (section 2).

▲ Indicates higher rank position since stages 1-5

### Quality of the evidence

The data and insight relating to this need area has become more robust with each wave as new reports were commissioned following Stage 1 to address 'gaps' identified. Most previous gaps in the evidence have now been filled and the majority of need themes are supported by robust and numerous evidence – however as themes evolve, further evidence may be needed. For example:

- There is further strong evidence that affordability, accessibility and the availability of flights and destinations are key factors when choosing which airport to fly from. There is considerable evidence about how this relates to surface access too.
- There is good evidence implicating the role of the brand within 'Airport Choice' – and within this how past experiences and familiarity are significant drivers of airport choice.

- There was greater detail in Stage 5 around consumer needs relating to the environmental responsibilities of airports, but limited evidence in Stage 6. As sustainability continues to climb the public agenda, further high-quality evidence will be needed to understand how consumer expectations in this area are evolving.
- There has been direct evidence relating to social responsibility in demonstrating (through service and brand) that all groups in society are considered/cared for, but more may be needed in future as the needs of next generation consumers become more apparent.

<b>AIRPORT CHOICE: Referenced in 262 out of a total of 503 reports</b>	
<i>Detailed analysis conducted using 201 reports</i>	
6	101
5	100
4	44
3	15
2	2

For our detailed analysis of ‘Airport Choice’ we have been able to draw on 201 reports that have been determined as being high quality (reports with a quality score of 6 or 5), along with 61 medium / lower quality reports providing broad affirmation of the themes discovered.

### Themes within this need area


The themes uncovered in the reports are explored and evidenced in more detail below.




**Key:**

**(H) identifies a passenger type or journey stage with heightened relevance to this theme / need**

**(E) identifies a passenger type or journey stage that is exclusively relevant to this theme or need (the theme / need ONLY applies to them)**



Theme	Needs & expectations within the theme	Key passenger groups	Key journey stage
<b>CAN FULFIL DESIRED TRAVEL PLANS</b>			
<b>1. Enables good value and affordable travel</b> N.B. people do not think of airport passenger charge, just visible costs. Value and price expectations /	<ul style="list-style-type: none"> <li>• Represents good value overall – considering what I am paying for the flight and the services I will receive via the airport.</li> </ul>	<i>No specific groups highlighted</i>	Planning / booking stages only

<p>sensitivity are in greater flux during the cost-of-living crisis</p> 	<ul style="list-style-type: none"> <li>Value for money / fairness of surface access charges e.g. public transport, parking, drop off fees</li> <li>Low cost / affordable (e.g. travel, hotel, currency, shopping options)</li> </ul>	<p>Family (cost conscious) (H) Young people (H)</p> <p>Direct short haul (H) Young people (H) Connecting (H) Women (H) Family (cost conscious) (H) PRS (H)</p>	
<p><b>2. An airport I can access</b></p>	<ul style="list-style-type: none"> <li>Based on where I live / am travelling from/to, it will be easy to get to.</li> <li>Includes suitable surface access options (e.g. timetables that suit, 24/7; public transport options need to be perceived as safe).</li> </ul>	<p>Departing passengers (H) PRS (H) Senior citizens (H) Young people (budget constrained) (H) Passengers in inaccessible areas e.g. rural or 'wrong' side of London (H) Non-UK passengers (H – for 24/7 transport) Family (H)</p>	<p>Planning / booking stages only</p>
<p><b>3. Offers flights I want when I need them</b></p>	<ul style="list-style-type: none"> <li>Provide the destination / route that I want (can include need for direct routes).</li> <li>The right timing / schedule for my travel need.</li> <li>I can use the airline I want to use.</li> </ul>	<p>Departing (H) Connecting (H)</p> <p>Business (H) Premium fliers (H) Frequent flyers (H) Domestic flyers (H) Overseas consumers (H) PRS (H)</p> <p>PRS (H) Business (H) Anxious flyers (H) Young people (economy providers) (H) LGBTQ+ (H) Those on airline loyalty schemes (H)</p>	<p>Planning / booking stages only</p>
<p><b>TRUST IT WILL DELIVER</b></p>			
<p><b>1. Believe it will be reliable and safe</b></p>	<ul style="list-style-type: none"> <li>Confident that I will be able to complete the journey without delay or cancellation.</li> <li>Believe it will be a safe journey and destination,</li> </ul>	<p>Connecting flyers (H) Premium passengers – greater expectation of reliability for higher price paid.</p> <p>All PRS (H)</p>	<p>Planning / booking stages only</p>

	(re)assured of processes to ensure safety.		
<b>2. Brands ‘for me’</b>	<ul style="list-style-type: none"> <li>The airport brand and reputation are appropriate for me and I can trust it.</li> </ul>	Young people (H) Potential passengers (H) International passengers (H) (e.g. Chinese love of Britishness) 	Planning / booking stages only
	<ul style="list-style-type: none"> <li>Other brands I will use (including airlines/low cost airlines) are suitable for me.</li> </ul>	Young people (H) Cost conscious (H) Frequent flyers (H) – negative preconceptions of low-cost carriers	
<b>3. I have clear and comparable information</b>	<ul style="list-style-type: none"> <li>I have the information that I need to make the decision including assistance and services available, and about (changing) processes, preparations and what to expect.</li> </ul>	PRS, especially PRM (H) Young families (H) Elderly (H) Transferring passengers (H)	Planning / booking stages only
	<ul style="list-style-type: none"> <li>I am able to compare flight &amp; surface access price options when deciding.</li> </ul>	<i>No specific groups highlighted</i>	
<b>4. Familiarity / habit</b>	<ul style="list-style-type: none"> <li>Prior personal experience of airport and surface access: key driver for choice.</li> </ul>	<i>No specific groups highlighted</i>	Planning / booking stages only
	<ul style="list-style-type: none"> <li>Prior knowledge of airport reputation</li> <li>Consistent processes</li> </ul>	Overseas travellers (H)	
<b>REFLECTS MY VALUES</b>			
<b>1. Environmentally responsible</b> 	<ul style="list-style-type: none"> <li>The airport has environmental initiatives to help sustainability (so I feel less guilty about travelling).</li> <li>Enable options to choose lower CO2 impact.</li> </ul>	Younger consumers, Gen Z (H) Some nationalities more environmentally conscious e.g. Germany (H)  More affluent consumers more likely to adopt behaviours to help sustainability <i>Not currently a primary driver for most passengers; potential growth in consideration indicated by forecasting reports</i>	Planning / booking stages only

<b>2. Socially responsible</b>	<ul style="list-style-type: none"> <li>The airport has initiatives to reduce impact on local communities / provide local opportunities.</li> </ul>	<i>Not currently top of mind for most passengers</i>	Planning / booking stages only
	<ul style="list-style-type: none"> <li>They show that they consider and care for all groups (e.g. disability champion).</li> </ul>	<i>Not currently top of mind for most passengers</i>	

**PERCEPTIONS OF AIRPORT EXPERIENCE**

<b>1. Differentiating/ memorable facilities, environment or service</b> 	<ul style="list-style-type: none"> <li>Aspects that can affect choice e.g. facilities that elevate experience, aesthetics, atmosphere, ‘wow’ factor, excellent service.</li> <li>Focus on aspects which support frictionless travel</li> <li>Will NOT be issues (e.g. staff shortages, long queues).</li> </ul>	<p>Younger passengers / Gen Z (H)</p> <p>International travellers – Chinese expectation for ‘extreme convenience, American desire for time efficiency (H) </p> <p>Business passengers (H)</p> <p>Connecting (H)</p>	Planning / booking stages only (drawing on previous experience / reputation)
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## Relating the theme to consumer journey and key passenger groups

'Airport Choice' needs are relevant to nearly **all passenger groups** (the exception being some VIP and business passengers who do not book themselves).

- **PRS and PRM:** Particular personal requirements mean greater up-front information needs when making their airport decision, including about assistance services available, facilities and airport processes. These passengers can also be more discriminating over carrier and give more consideration to airport access.
- **Young people:** Distinct needs at the booking stage as they are often more budget constrained, short haul & low-cost supplier focused, and more reliant or sensitive to brand reputation (and may be put off by a 'big' airport). Some evidence that environmental initiatives drive positivity particularly amongst young people too.
- **Families:** Increased cost sensitivities due to budget constraints and/or travelling in a larger party, which may lead to heightened needs for low-cost carriers and surface access options. Easy access helps reduce travel stress and may influence choice of airport.
- **Younger:** Increased cost sensitivities due to budget constraints, which may lead to heightened needs for low-cost carriers and surface access options. May be more influenced by environmental/social responsibility credentials.
- **Business/premium travellers:** More demanding on the right timing / schedule of flights, and less cost conscious. May choose airport based on specific airline due to loyalty rewards, or because of perception of premium lounge facilities.
- **Connecting passengers** are particularly looking for a reliable choice – and potentially more experienced fliers think ahead about the ease of connection.
- **Infrequent or anxious passengers** have heightened needs around requiring information and travel requirements for their journey, to make it easier to comply.
- **International passengers** can be more influenced by airport brand reputation – for example, evidence to suggest that Chinese customers are more strongly motivated than most to choose an airport based on its global stature, or perceived efficiency.

## Changing needs to monitor

### Impact of cost of living

The most recent synthesis waves have indicated that cost-of-living increases have been a key contextual factor impacting lifestyle choices for consumers. Travel-related impacts include cutting back on travel or changing the timing or type of flights booked. In particular, the changing economic situation appears to have increased consumers' need for affordable airport access and travel options. While in Stage 6 a few reports note that consumer economic confidence appeared to

stabilise towards the end of 2025, with some early impact on travel attitudes, recent global events such as the US-Israel war with Iran may have had further effect; the full impact on affordability-related needs may become clearer in Stage 7 of the synthesis.

### **Environmental sustainability**

There was evidence in Stage 5 to suggest that sustainability is climbing the public agenda and that sustainable air travel may start to become a point of differentiation for consumers – particularly younger generations. There was very limited evidence on this topic in Stage 6 and it should be closely monitored going forward.

### **Elements supporting frictionless travel**

There has been a significant increase in evidence highlighting that consumers are placing increasing importance on the efficiency and smoothness of their journeys and that the provision of initiatives and services which allow consumers to control their own journey experience are beginning to become a differentiator for airports. There will likely be further evidence around consumer needs in this area as technology and processes evolve.

## Evidence gaps

### **Environmental attitudes**

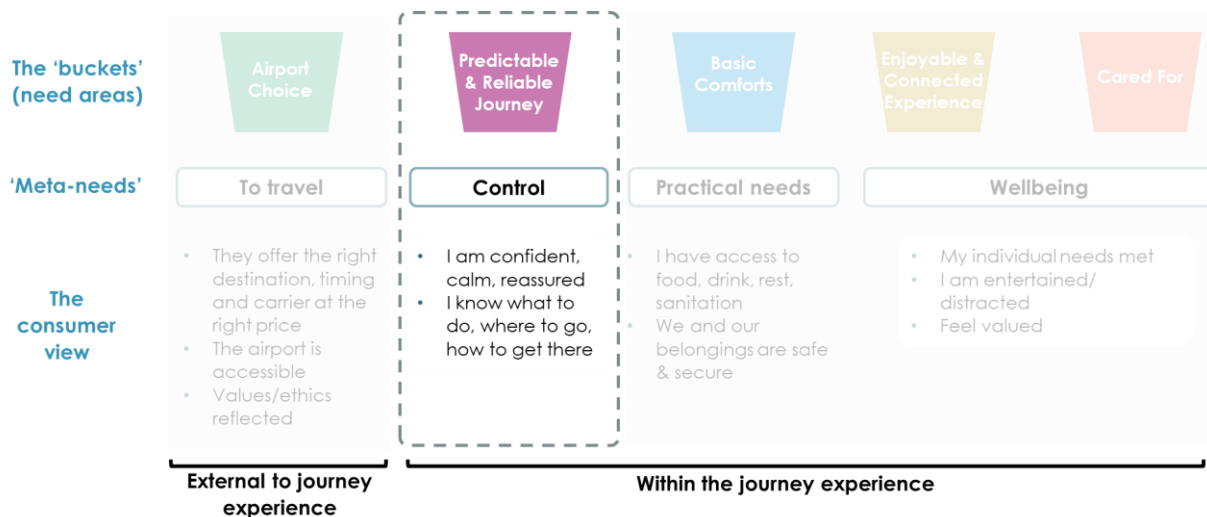
As above, while recent waves have increased the amount of evidence about the expectations passengers have for airports around sustainability, it is unclear at Stage 6 the extent to which environmental initiatives factor into consumer choices.

## 4.2. PREDICTABLE & RELIABLE JOURNEY

### Introduction

This ‘bucket’ reflects a core need for consumers to be able to navigate different stages in the airport journey including within, to and from the airport. This applies to both direct and connecting passengers. Its importance is reflected in the high number of reports dedicated to the broad subject of passengers moving to, from, in and around the airport. From a consumer perspective, this need area can be paraphrased as:

***“I have a predictable and reliable journey because it’s easy to move to, through and from the airport”***



There are a wide set of themes which sit within the ‘Predictable & Reliable Journey’ need area and while the needs stated are often framed in rational language, all relate to the emotional need for control. In the context of air travel and specifically the role of the airport, control is encapsulated in the need for consumers to feel confident in two respects:

- Their journey will be in line with expectations and run to plan
- The service will be reliable (e.g. high frequency of punctual trains and flights leaving on time)

In the well-documented heightened anxiety that is often experienced by air travellers, creating an environment and delivering a service that is both predictable and reliable will aid a passenger’s ability to prepare for their journey in advance and alleviate stress on the day. ‘Predictable & Reliable Journey’ needs are heightened for certain consumer groups – such as those with limited mobility or those with personal circumstances that may be less visible (cognitive, psychological or sensory issues); and families who have additional challenges to consider. These needs are also heightened

for consumers with higher expectations for a seamless and speedy experience, namely connecting passengers, business passengers and VIPs.



Stage 6 contributes to a growing evidence base around passenger expectations for digital and automated options to support a seamless, low-effort journey. What emerged during COVID to enable travel has evolved into a more established need for technology that simplifies processes, reduces friction and gives passengers greater control. There will likely be further evidence around consumer needs in this area as technology and processes evolve.

Passengers' primary needs are similar, irrespective of airline: smooth progress through the airport with no hold-ups; clear, accurate wayfinding; no surprises.

### **Consolidated Passenger Insights Report July 2018\_Final**

#### Overview of the themes identified within 'Predictable & Reliable Journey'

There are 3 key themes within the area of Predictable & Reliable Journey:

- A. Easy and quick:** in essence, this theme is about being able to move forwards to each next step in the journey with minimal stress, as quickly as possible. It encompasses convenient modes of transport for each stage – and assistance when needed; and manageable walking distances with no long queues. Evidence clearly includes the journey stage from home/starting point to the airport and some heightened needs for PRS and PRM consumers.

[Passengers need] To feel that this is an easy airport to access and use.

#### **WP01 WTP Qualitative**

1. 'Smooth progress and punctuality': this relates to punctuality of flights, surface access and baggage arrival; seamless journey stages; minimal steps; and clear, well-functioning processes. Passengers expect journeys to be simple, streamlined and predictable, with minimal friction and delays at each stage – and ultimately 'everything to happen on time'. In previous waves there was also evidence of cultural differences in expectations, for example Chinese passengers more expectant of 'extreme convenience' and Americans particularly valuing time efficiency.

In Stage 6, there is continued evidence that seamless, efficient journeys facilitated by the automated and self-service options detailed in the Basic Needs bucket remain a core expectation and a key driver of overall satisfaction. Passengers increasingly view smooth progress as a hygiene factor, with disruption, delays and friction (e.g. queues, complex processes, unclear information) standing out as primary sources of dissatisfaction. Security,

check-in and connections remain critical touchpoints, with a strong emphasis on efficiency and simplification of core processes. There is also growing evidence that passengers are willing to adopt new technologies and services where these demonstrably improve flow, reduce effort and minimise disruption. These needs are particularly acute for business travellers, connecting passengers and those requiring assistance (PRS/PRM), for whom delays, inconsistency and lack of seamless handovers can have a disproportionate impact on the overall journey experience.

Simple but organised processes, working well and streamlined without hold ups: minimum number of steps, each step to be quick. They all want a smooth, stress-free journey that flows well and gets them to gate quickly and efficiently.

**WP01 WTP Qualitative**

The American phrase 'time is money' encapsulates the American idea that time can be spent and saved like a commodity. Directness is important and delays not tolerated: they demand immediacy and efficiency across the board.

**Heathrow Culture and Trends Review, November 2018 .pdf**

*'The key thing for me in travelling to the airport is for this to take the minimum amount of time, the service to be frequent or, even better, matched to my specific schedule and to run from as close to my location as possible - ideally directly from my location.'*

**Horizon Report Surface Access October 2018**

*'Given today's technology, I'm at a loss as to why the Heathrow app doesn't provide all the flight departure and gate data in real time, with alerts when one's flight status changes - why do we rely on information boards nowadays?'*

User, British, UK, Male, 45-54

**Innovations at Heathrow Report v1.0**

Flight punctuality remains the most important element of direct and connecting passengers overall journey experience. Passengers want to ensure waiting times at key points across their in-terminal journey are minimised despite the new processes in place....Automated and touchless systems will be preferred across the airport.

**Passenger Priorities and Needs Post COVID-19 10.06.20.pptx**

*'[Heathrow] really needs to have something like TSA Precheck where we don't have to take out our laptops nor our liquids. Speeds up things immensely, which is what I would want to happen in the Fastrack queue.'*

**Horizon Post COVID-19 Ethnography. 2022.**

While the airport has made strides in enhancing the overall passenger experience, lingering concerns about queues and rising apprehension about flight delays are evident. Though flight delays aren't always within the airport's control, it's still a big concern for passengers as it has a large impact on their overall journey.'

**Summer travel behaviours- Oct 2023.pptx**

On the reasons for a positive view of Heathrow; *'I heard by friends that, despite the transport/train strikes in December, Heathrow was fairly organised and flights in general were not delayed'*

**Heathrow Travel Behaviours Survey W14 Exec Summary.pptx**

*'It mentioned potential summer strikes by passport control and we did feel concerned that there might be some delays or even cancellations in terms of our trip.'*

**Heathrow Travel Behaviours Survey W16 Exec Summary.pptx**

Minimising disruption, while not the most widespread number-one priority, ranks within the top-three priorities for almost as many consumers as reducing costs. This appears in the top three priorities of those aged 55+ in higher numbers than any other area, including reducing costs. Moreover, a quarter of those who believe flying has worsened over the last decade (24%) say minimising disruption should be the number-one focus.

**Aviation Consumer Survey - Wave 13**

Smooth processes, minimal friction, helpful staff and clear wayfinding are the main contributors to a good experience. When these don't work... queues, unclear information or busy spaces... they become the main source of poorer experiences.

**Horizon Travel Personas 2026 v3**

In 2024, 41% said delays and cancellations had the biggest impact on their trip.

**SITA - Passenger\_Report2025\_ACIG.pdf**

When it comes to processes, what many airports, including Schiphol, are working on is to have passengers simply walk through the airport without needing to pass through all the gates and the checks. That could be done using biometrics and automatic gates, and it would make flows much more natural and smoother. For passengers, it would be a less stressful and much happier experience.

**McKinsey - The Future of Airports - Nov 2025**

2. 'Easy airport to access, move around and exit': this need relates to easy physical movement throughout the journey; quick and convenient transport options for each stage; minimal walking distances; and, where needed, mobility assistance. As seen in previous stages, minimising queues remains a central requirement, with passengers seeking to move through the airport without prolonged waiting or congestion. In Stage 6, queues across security, immigration and boarding continue to be key sources of frustration and overcrowding within terminals is also highlighted as a persistent issue, impacting comfort and ease of movement, particularly in high-traffic areas. As before, this need is heightened for elderly passengers, families, and those with reduced mobility or additional support needs, for whom long walking distances, queues and crowded environments can add stress and make the journey feel more difficult to navigate. Innovations that support independent movement, such as autonomous wheelchairs, are particularly valued by PRM.

*'I know Heathrow is a big airport and the long distances are necessary. But you have to walk so long from the plane to customs and baggage.'*

Non-EU Leisure Direct

**WP01 WTP Qualitative**

Access was, not surprisingly, more likely to be one of the barriers to flying mentioned by those who previously defined themselves as having health related access restriction.

**CAP1303 Consumer research for the UK aviation sector final report**

In particular, dedicated lanes at Security for passengers who would like extra assistance was highly valued by PRMs (at more than £12 per PRM passenger/trip).

**10641312 Heathrow Airport Customer Valuation Research Final Report\_v0.5**

*"When you're in your 80s it's the walking. I've never been anywhere where you have to walk so far. We were quite alone coming along there from the plane (T2) and it was not very nice. There was nobody to ask if we were doing the right thing. We're unusual for our age to be able to walk so far. It would have been*

*nice to have a courtesy buggy like they do at Euston Station. I always get a lift there.”*

UK Leisure, Arrivals Hall  
**WP01 WTP Qualitative**

Long queues are a key factor in people choosing to book special assistance. The majority of passengers are using the service because they cannot walk long distances (86%), a smaller proportion are using it due to personal circumstances (16%) or they *need* help with luggage (14%). Many passengers wanted reduced wait times (20%) with some waiting up to 1:30 hours with the main pinch points at pre-security and disembarking the plane (missing connections). Other factors included more staff (15%), better communication (12%), amenities including independent access to retail (9%) and a PAS fast lane (6%).

**2022 Customer Satisfaction and Engagement Review.pdf**

*‘For me it is more about going through easily rather than quickly. If you’re at ease with everything, everything is quick after that. It feels quicker. If there is camaraderie amongst the people working here it feels better.’*

**Final PRS PRM Security Lane Trial T2\_Caroline Thompson findings v1.pptx**

*‘Passenger was with [their] kids, so she wants special queues in immigration for people with kids as she had to wait in queue for one hour.’*

**civil-aviation-authority-aviation-consumer-survey-wave-12.pdf**

*‘If I’m on the go I want to get in and out as quickly as possible because everyone is going to be in the way.’*

**Horizon Sense of Place v1 09April2025**

Customers like the idea of autonomous wheelchairs for the perceived efficiency - they don't want to spend more time waiting for staff to become available. They also want to have more control over their journey (freedom to make their way to the gate in their own time, navigate the IDL and facilities, with less waiting around)

**Horizon x Human8 Autonomous Wheelchairs Final**

Performance of music: Location in T3 created ‘traffic jams’ when busy flights called; frustrating some enroute to gate.

**Heathrow Summer Sounds 2025\_Research Findings\_31.07.25.pptx**

Taxis are valued for their convenience, comfort, and well-located drop-off points, though they require advance booking. Business travellers often choose it for efficiency and convenience. Families with babies and larger groups prefer them for practicality and cost-sharing, despite some feeling pressured to move quickly when unloading.

#### **10409 - Heathrow Premium Customers - Report VF\_C**

Although 34% believe security checkpoint queue times need improvement, this has reduced from previous years. Passengers prioritize rapid transit from the airport to the boarding gate, valuing efficient boarding gate queues (49%), and sufficient overhead storage (35%), while avoiding buses to the aircraft (43%).

#### **IATA\_GPS\_2025\_Report**

3. **‘Speed of progress’:** for many consumers this relates to the shortest possible journey times. Many passengers, especially business travellers and connecting passengers, prioritise the fastest possible progress, choosing the quickest surface access mode of transport and with expectations for short wait times from their arrival point to their departure terminal through bag drop, check-in, security, immigration and baggage reclaim. Technology is regarded positively for speeding up the journey, and some passengers also seek add-on services – a new code at Stage 5 which has increased in importance in Stage 6.

However it is important to recognise that for some passengers, ‘fastest speed possible’ is not the overriding priority; these passengers - more likely to be older demographics, passengers requiring support, leisure travellers, families and less experienced flyers - want to move at the ‘right pace for me’ and not feel rushed.

There is emerging evidence that a ‘time-saving’ mindset is influencing passenger behaviour beyond core travel processes; for example, seeking out quick or grab-and-go food and drink options, or using Reserve & Collect services to bypass queues in retail outlets.

*‘As a business class passenger, I expect quicker baggage check-in and not long queuing to check-in desk. Also, so-called fast track through security: more like slow track.’*

#### **Consolidated Passenger Insights Report July 2018\_Final**

*‘We felt like we were being rushed through the airport and not given time to organise all our paperwork. There was never a queue behind us so we weren’t*

*holding anyone up. We were choosing to take things steady! People forget that many travellers don't know what to do or can't move quickly.'*

**PRS Research Full Quant Report.pptx**

Mainstream brands have raised expectations: everyday experiences of brands fulfilling their needs in super quick timescales, in a personalised way.

**WP01 WTP Qualitative**

*'Fast Track is important on going in but often you look across to the main area and it is empty and you wonder why you are in Fast Track with lots of people ahead of you....and on the way-out people struggle to understand why only 5 out of the 25 electronic gates are open.'* Premium Passenger.

**WP01 WTP Qualitative**

For those passengers who did identify one or more areas of dissatisfaction, the common complaints related to long waiting times for various procedures (security checking, baggage reclaim, immigration counter) and long walking distances at the airport.

**CAP 1044 CAA passenger research satisfaction with the airport experience**

*'The quickest public transport links shown would all take considerably longer than driving my own car. Unless public transport from my area improves to a point where it is as quick and convenient as driving, I will continue to drive if I have to fly from Heathrow.'*

**87093\_HVAC - full report - Final with follow-ups**

Perception of speed is the key measure by which passengers judge their security experience to have been a success. Passengers prioritise 'getting through' security as quickly as possible.

**2022 Customer Satisfaction and Engagement Review.pdf**

On their reasons for arriving at the airport earlier than is recommended, *'Because last summer I queued for two hours to get through security at Heathrow and only just made my flight (and that was because it was delayed so I was lucky!) It was very stressful.'*

**Horizon- Travel Intentions 2023.pptx**

On their reasons for giving a rating of 'Poor' or 'Extremely Poor' to the non-trial lane, *'It took a long time. Very slow.'* [...] (Another respondent) on their reasons for giving a rating of 'Poor' or 'Extremely Poor' for the trial lane, 'Felt rushed

through the process. The tone of the employee was abrupt and [they] did not say please or thank you.'

**Opinion T2 Security Trial - December 2022 + January 2023 - Report.pptx**

'Speed is the essence at the Airport.'  
**gps-2024-highlights**

Long wait times is a top frustration that autonomous wheelchairs could maybe help with. "The biggest perk would be drastically cutting down on the time spent waiting for assistance and the stress of rushing through terminals, meaning I can actually use that time to catch up on emails, or just breathe between flights."

**Horizon x Human8 Autonomous Wheelchairs Final**

Speed and efficiency are very important to Alex as a business traveller. He appreciates when staff step in to help passengers around him who need further support / instruction as he feels this ultimately makes the flow smoother for all passengers. He also appreciates when technology (e.g. new scanners) makes things quicker.

**Human8 Horizon Service in Security case studies.pptx**

Almost two in three (64%) want shorter waiting times. ' Changing passenger expectations translates into business opportunities [...] 66% of passengers say they would pay for faster, more convenient airport processing, up from 62% in 2024.

**SITA - Passenger\_Report2025\_ACIG.pdf**

Time saving: a third note that being able to purchase items ahead of time means less time shopping and allows them more time before their flight to relax and grab something to eat. *"Last time I headed out, I used Reserve & Collect to snag my favorite skincare set and a specific bottle of gin that's usually sold out, and it was honestly a lifesaver because I just breezed past the crowds, picked up my bagged items in seconds, and had way more time to grab a coffee before boarding."*

**Human8 Horizon Reserve & Collect v3.0 (1).pptx**

- B. In control of my journey:** This theme reflects the importance consumers place on having autonomy over their own journey, which is facilitated not only by having the necessary information to make the best decisions for themselves, but also the services to allow them to expedite their progress if desired. This need includes all passenger groups, including those for whom English is not their first language.

1. **‘Clearly, consistently and fully informed’:** This need relates to providing accurate, consistent and timely information with the right amount of detail through multiple channels (physical and digital) to ensure passengers are fully up to date. Increasingly, passengers expect to be able to access information via apps and mobile devices, collating real-time updates in a single place. Key areas for increased expectations around information include security, self-service processes such as check-in, bag drop and immigration, and connections where passengers may be disorientated; in Stage 6, there is stronger evidence that information at these high-stress journey stages plays a key role in reducing anxiety and enabling a sense of control, with passengers actively seeking reassurance that they are on track. There is also increased expectation for unambiguous communication where processes have changed or may differ between airports (e.g. security requirements).

Being informed is a fundamental expectation for all passengers, but there is continued evidence in Stage 6 that suggests that it is a critical need for those relying on Passenger Assistance Services, where lack of updates and visible information can lead to heightened anxiety and a fear of being ‘forgotten’.

Passengers would appreciate clear and early instructions of what will be required from passengers in security screening.

#### **Travel disruption**

*‘A personalised text message makes you feel like the Airport is dealing with you directly, and that you’re not just a number.’*

**Horizon Security Information Report.pptx**

If experiencing delays, passengers like to be kept informed about their situation, and it’s important this information is as accurate as it can be. Passengers appreciate and value transparency with regards to communication of the length and cause of delays.

#### **NATS**

The most important need identified by respondents to the airport survey was information about the status of their flight.

**CAP1258\_Disruption\_research**

*‘My easyJet app was saying one thing, and the board in the airport was saying something completely different. It’s very frustrating when it feels like the airport and the airline aren’t communicating with each other.’*

**Heathrow resilience debrief Updated\_ 14.02**

*“I liked one airport where there were images at baggage reclaim showing the arrival of the baggage trolleys prior to putting bags on the carousel; it didn’t increase efficiency but reduced the stress of not knowing what was happening.”*

User, British, UK, Male, 45-54

**Innovations at Heathrow Report v1.0**

*“In Frankfurt there was a big food zone so you know you’ve seen everything and can make a choice; Heathrow should at least have a planner saying what’s in the terminal.”*

**Heathrow F&B Qualitative Interviews Q3 2020.pptx**

*‘They don’t tell you they take you only an hour before your flight. You need a screen, so the names come up...which flights are coming up...we haven’t a clue what is going on. No one says when we’re going...they’re under pressure because there are so many people, but they don’t expect anything...It’s about being told what’s happening.’*

**PRM Volunteer Trial- Caroline Thompson.pptx**

Pax [sic] mentioned that the flight departure screens change too quickly and the information is a little small.

**Passenger Segments Review 2023.pptx**

*‘We had no advance notification that fast track security was using the new scanners, so - like everyone else, it seemed - we had prepared for taking out liquids and using the clear bags, etc. There was no obvious signage that the new scanners were being used, so everyone joining the queue seemed equally unaware. And this led to confusion, lots of shouting by security staff about leaving laptops and liquids in your bags and people being told to leave footwear on.’*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

Many of these [PRS] passengers misunderstand the rules especially regarding ‘liquids’ – there’s an opportunity to get back to basics with the communications and messaging.

**PRS Trial T2- September CTA final.pdf**

*“What I want to know is where I need to go, and how do I get there fastest. I guess I’d like a display showing all the connections flights...our destination flight number and gate number and terminal.”*

### OSS Draft Report Waves 1-3 25 March 2025

People want very clear communication about the new rules.

*"I think a little pictogram sign would be good. But someone to tell you would be nice too.*

*You know that person who guides you into the lanes for the boarding pass gates? They could tell you 'remember there are new rules, you can leave everything in your bag'. You're a bit tense then. If you hear someone telling you something in an affirming way, in a positive way, it would be good. Very reassuring."*

#### 12 Sept CTA Pre-Compliance Resourcing Report Final.pdf

The research suggests how small innovations can make a big difference. Live travel updates, digital wallets holding travel documents securely, and smart baggage tracking. These were a few cited by travelers from all over the world to reduce anxiety and deliver a better, smoother travel experience.

#### AMADEUS - Connected-journeys\_ACIG.pdf

Some passengers with disabilities, as well as some with mobility issues, reported that they found airports and their processes inaccessible. Main challenges included unclear information about available support during booking and boarding, a lack of assistance staff, and navigation difficulties.

#### cap3213-annual-consumer-survey-savanta-flying-in-2025-and-beyond.pdf

*"It says the belt might have to come off. Just say it. Rather than say may. Are they definitely going to ask us to remove our belts? Yes? Then I would put that on the sign."*

#### 18 MAY Security Messaging Trial T3 FCC Qual Report May 2025

2. 'Empowered to make the right decisions': this theme includes the need for consumers to have the right information at the right time, empowering them to make appropriate preparations and decisions regarding their travel. This includes seeking out information pre-journey in order to feel in control of their journey and alleviate anxiety and stress; in Stage 6 there is evidence that this is a more prominent need for passengers with additional needs or dependencies, including families, who may require details of specific airport services and facilities to support planning and reduce uncertainty. There is growing expectation of real time updates and alerts at all stages to allow consumers to make best use of time e.g.

expected busyness of terminal, queuing times at check-in, security and immigration, expected baggage arrival time, gate announcements etc – but only if it is accurate, comprehensive and effectively delivered. Live updates become especially important when disruption occurs, letting consumers know about delays and enabling them to plan accordingly.

Those using Passenger Assistance services have an increased need for information which can allow them a sense of control over their experience; for example screens in the PRS lounge with projected waiting times and real time updates on position in the queue, with portable buzzers which alert when it is their turn, allowing them freedom to use facilities outside of the lounge without apprehension. The functionality of these digital information channels is critical, as failures can have a disproportionate impact on confidence among this audience, who already have reduced agency and control over their journey.

26% of passengers said that if they were informed about a longer wait time period when arriving at the security queue, they would do something different to pass the time.

**Horizon Security Information Report.pptx**

*'It's better to know so you can let the taxi know when to pick you up – I don't want to be charged for their wait time at the airport, and he needs 30 minutes notice.'* **Immigration Wait Time Signage Research Report 27 May 2022 CTA .pptx**

Providing a 'one stop shop' for improved and accurate real time travel information to and from the airport could help Heathrow to stand out as a leading force amongst both UK and non-UK residents.

**Horizon Report Surface Access October 2018**

Bag collection is a notorious pinch point, but here the positive effect of technology is clear. When passengers use services like real-time notifications, their satisfaction is 8.6% higher.

**passenger-it-insights-2019.pdf**

Business travellers want providers to be upfront about travel time and frequency of service to ensure they arrive on time.

**17-041179-01 HEx Price and Value**

Improving passenger information in the event of disruption was the number one suggestion made by participants. They particularly wanted information about

disruption to be provided earlier, pushed out to them more and updated more regularly.

### **Travel disruption**

Early gate info, clear signage, instructions re. length of time to reach the gate and a personalised 'alert' via apps to 'go to gate' all have appeal. They desire total control and the ability to plan their time.

### **170531 Heathrow DNA Programme Integrated debrief FINAL**

59% of respondents agreed that they would feel reassured for their upcoming trip if 'receiving information from the airport on estimated wait times you can expect when queueing ... at check-in, baggage check or security check'. 52% of respondents agreed that they would feel reassured for their upcoming trip if 'receiving information from the airport on how busy the terminal is expected to be on the day you are travelling'.

### **Horizon- Travel Intentions 2023.pptx**

*'[Show] how busy check-in and security [are], and passport control [for arrivals] is, show cameras of the live-feed so we can see.'*

### **Horizon x Human8 - Heathrow service signatures report - v1.0.pptx**

*'Employ more staff, better communication, publish waiting times for airports on a website to show the lengths of queues so people can get a real-time experience.'*

### **Summer Travel 2023 Live Chats report.pptx**

Almost all travellers note that they would appreciate some indications of the boarding gates distance so they have a view of how much longer they have to travel to their gate.

### **10409 - Heathrow Premium Customers - Report VF\_C**

In the case of the power outage, around a third offered suggestions for improvement in communications: As early as possible communication to allow time for planning / change of plans.

- *"The information should be passed on earlier"*
- *"The airline should have communicated with my friend faster."*

### **Heathrow\_Outage\_Research\_FullReport\_v2.0**

*"I think Heathrow handled it very quickly because what they came out and said was, right, we're closing for 48 hours. Everybody knew it wasn't a happy situation, but there was a decisive decision made. So as soon as*

*that's known we [travel agents], can get people booked and start calming the situation down; [it's] a very stressful situation if you're a traveler and for those heading to the airport, you're able to say, - look, a decision's been made, [the airport] isn't going to be open, so stay away."*

**P046857 Heathrow Travel Agents 2025 - Research Findings V3**

More so than other areas of T2, functionality issues cause distress amongst PRS - an audience which has largely relinquished agency / control . Fundamental goal of empowering PRS to use of T2 services & facilities is in fact worsened by the totem with regards to the overly confusing design / format & tech issues (the 'fault of which' is unclear to elderly / non-native English speakers). Loss of agency / confidence is exacerbated when screens malfunction. Whilst a frozen screen is frustrating at the best of times, for those 'brave' enough to search for information independently within the PRS area, a lack of response / desired result can spark significant embarrassment, frustration &/or fear. "No, it's my fault, I'm sure. I just feel old and stupid. I'm sorry – I just don't know how to work this.

**T2 DIGITAL ASSETS - Full Findings - 22.07.25.pptx**

3. 'Add-on services to facilitate journey': This theme captures the desire for a range of add-on services that support passengers in managing and streamlining their journeys, both pre- and in-airport. Passengers seek to complete as much as possible in advance through services such as advance bag drop-off, twilight check-in, security pre-screening, Digital Travel Credentials (DTC), and trusted traveller schemes, with growing interest in digital and biometric solutions, and integrated journey management supported by digital travel tools. Similarly, some passengers desire the efficiency and convenience of services such as fast track, virtual queuing, 'greeter' services to aid orientation, end-to-end baggage handling, concierge support, and 'click and collect' duty free which is bought in departures and picked up in arrivals. While initially driven by COVID-related requirements around documentation and preparation, this has now evolved into a broader and more established need centred on efficiency, control and personalisation of the journey experience, particularly in response to airport crowding.

There is continued evidence in Stage 6 of strong demand for add-on services that increase efficiency and enable greater control over the journey, with high willingness to pay for faster, more convenient processing. Business and premium passengers place particular emphasis on speed, prioritisation and seamless processing (e.g. fast track, priority lanes), while families value services that reduce complexity and effort (e.g. concierge support).

Expected security delays are a great source of stress and so many take some kind of action to try to reduce the impact of these. 36% arrive at the airport earlier than recommended, 22% sign up for a security pre-screen, if available, in order to go through the "fast lane" at the security checkpoint, 22% opt not to check a bag in order to skip the queue at airport baggage check, 17% if available, sign up for virtual queuing to go through security, 6% drop their bags at the airport for an earlier check in (e.g. 24hrs before the flight) if available.

#### **Horizon- Travel Intentions 2023.pptx**

A seeming increase in the frequency of issues related to airport operations... has led to a decrease in expectations and clear mitigating actions being taken among a portion of passengers. A number will do what they can to enhance their experience via add-on services e.g., fast-track [security], luggage drop-off. Others mention packing lighter to avoid having to check baggage.

#### **Summer travel behaviours- Oct 2023.pptx**

*'Passenger said, even if he had to pay for it, it would be really nice to have a meeter [sic] & greeter to guide them through baggage to bus for long stay car park, or point of onward journey.'*

#### **Passenger Segments Review 2023.pptx**

The majority (85%) believe that having a DTC would be useful to their journey, with more than half (54%) viewing it as something that would be 'very useful'. Younger travelers are particularly keen on this new technology, as over 90% of travelers aged 18-44 viewed DTCs as useful to their journey.

#### **passenger-it-insights-2024**

Concierge escort to check-in appeals to families with young children looking for convenience and premium passengers who want the premium experience to start immediately.

#### **10409 - Heathrow Premium Customers - Report VF\_C**

- 66% of passengers say they would pay for faster, more convenient airport processing, up from 62% in 2024.
- 78% of passengers would pay for end-to-end tracking of their baggage, which is still the

benchmark of trust in air travel.

- 79% of passengers are now ready to adopt digital identities on their phones, up from 74% in 2024.  
66% would even pay for this service.

**SITA - Passenger\_Report2025\_ACIG.pdf**

Passengers most wanted to complete immigration before arriving at the airport (41%), followed by check-in (36%) and baggage check-in (19%).

Notably, preference for baggage check-in rose compared to previous years.

**IATA\_GPS\_2025\_Report**

Priority services and essentials such as food, drink and basic amenities remain the top priorities for airport spending. Consumers are continuing to cut back on luxury goods, tobacco and alcohol products.

**Heathrow Brand Tracker presentation - July 25.pptx**

84 percent of passengers are more likely to use Heathrow again when secondary screening is not required, with 62 percent indicating the highest likelihood. The service provided will most likely lead passengers to connect through Heathrow again in the future. This is also reflected in the passengers' open answers. "Heathrow Helpers is a game changer. I would pay for this service every international connection if offered.

**T3 Short Connections - Overview Report.pptx**

**C. Find my way around:** consumers want to be able to locate themselves and easily find their way at all stages of the journey. This includes good orientation as well as clear signs with the appropriate amount of information. Consumers also want to be able to locate themselves in the airport, which is particularly key post-arrival.

1. **'Signage'**: relating to clarity, consistency, location and comprehension of signed information, amongst all passengers including non-English speaking and those who have sensory impairments. Certain passenger groups may be particularly reliant on early and clear signage, such as infrequent travellers and families. The need for signage extends across multiple channels, including digital. Visibility of information is key – situated in prominent locations, visible from a distance, an appropriate size and, where digital, the display not changing too quickly. In Stage 6, future-focused reports highlight the potential for highly personalised signage tailored to individual passengers' journeys and preferences; whilst not yet an established need, this will be an area to monitor in future.

Keep in mind the primary ‘point-of-view’ of passengers once they disembark is to be mobile... any information they receive will have to get their attention and get through to them while they’re on the move and likely rushing.

**Horizon Arrivals Information Report v2.0 March 2022.pptx**

*‘Another thing I like a lot here in Heathrow is the yellow and purple signs... you have a clear faraway visual identity of where you should go.’*

**Ambience at the Airport**

*‘Clear signposting to collect the luggage made the journey to the luggage belts easy. Good size screens told you at first glance which belt to go to.’*

**Horizon Arrivals report v1.0.pptx**

*Forecourt Pick-Up (T3) ‘The signage isn’t very good for short stay. Maybe it should say Short Stay and Passenger Collection as you come through. If you don’t drive in London or around here, you’re not used to the congestion. People are watching where they are going, and what to do, and aren’t looking at the signs in detail.’*

**Heathrow Forecourt Research Qual debrief Sept 6<sup>th</sup>**

*‘Directional signage around the D&R check in/check out area and trolleys would be useful.’*

**Drop and Ride Research - Final Presentation**

People now insist information and wayfinding is delivered via multiple channels – including social media, digitally, static signs, via staff and announcements throughout the terminal.

**Passenger Priorities and Needs Post COVID-19 10.06.20.pptx**

*“The [signage] colours work pretty well. I think they are clear. Maybe one should keep the colour coding all the way, or at least not use similar colours when the previous colour code/scheme is broken.”*

**Arrivals Deck - Workshop Day 1.pdf**

Information is currently not as readily available and accessible as customers would like it to be... Changing the blue colour of Passenger Assistance signage, to make it more distinctive from British Airways branding, could be worth considering if changing colour is within future design scope. Feedback in T5 suggests that PA signage does not always stand out as much as it could next to BA branding.

**Waiting Areas Evaluation Research - Debrief - FINAL.pptx**

PA customers have to trust in the system and information can be a critical way of establishing that... Use of information touchpoints (staff and signage) to inform passengers is likely to reassure users and help build confidence in the system.

**Heathrow Passenger Assistance Service Journey Assessment Debrief  
270323.pptx**

The recurring theme across all findings is the significant role that clear, consistent, and visible signage plays in enhancing passenger experience. Where signage is lacking, unclear, or inconsistent, passengers encounter confusion, congestion, and frustration.

**Tobii - Heathrow Wayfinding T3\_CLIENT v1.1**

“I’d like a sign. I don’t want to stop and talk to any staff.”

**12 Sept CTA Pre-Compliance Resourcing Report Final.pdf**

For young families, ease and predictability are crucial. Reducing friction from the outset helps parents focus on their child’s comfort rather than logistics. Simple details such as readily available trolleys or clear family-friendly signage can strongly influence perceptions of care and efficiency.

**10409 - Heathrow Premium Customers - Report VF\_C**

When you’re in the terminals, the signage will be completely personalized. The departure screen will know it’s you. Signs that know exactly where you’re going will point you in the right direction—whether to a restaurant, a club, or the gate. It will be in your language, whatever country you’re in. And it will help you navigate from the time you enter the airport until the time you board the flight.

**McKinsey - The Future of Airports - Nov 2025**

2. ‘Flow, direction, wayfinding and orientation’: this relates to needing a clear sense of where you are at all stages of the journey (both in the airport and in transit to and from) as well as an intuitive sense of where to go because of the terminal lay out and sightlines. As in ‘Signage’, in Stage 6, future-focused reports highlight the potential for digital initiatives to enhance wayfinding, helping passengers orient themselves more easily and reducing cognitive load and stress – an area to monitor in future stages.

*'It was hard to find the screens to see which baggage carousel we needed to get to collect our bags.'*

**LHR - Heathrow - Customer Ease and Enjoyment Feedback - Kokoro\_Mar 20.pptx**

Some participants felt that getting around Heathrow could be daunting due to its size and that it wasn't always straightforward to navigate through it, particularly for new users or if moving between terminals was required.

**Travel disruption**

*'The walking route from dropping off car to the office and then to the bus stop is uneven and circuitous – difficult to manage with luggage and/or children ...and doesn't have any shelter from the rain en route. A covered walkway would be ideal and make wayfinding easier.'*

**Drop and Ride Research - Final Presentation**

Wayfinding and services clearly communicated, so they can make the most of their time, with minimum effort on decision-making & searching.

**DNA Integrated Analysis: The way forward**

Clean open spaces that look modern and sleek give passengers a sense of calm, but also are perceived to manage passengers better when moving through the airport – for example using curved design principles.

**Innovations at Heathrow Report v1.0**

*'Whilst the commercial intention of these spaces is to disrupt passenger flow, from a passenger perspective this can be really stressful and difficult to navigate through.'*

**Walk Through Duty Free Understanding Report v1.0**

*"All the U-turns while in customs and coming out are annoying with people clueless on where to go blocking your way."*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

A long corridor with an open sightline ahead and below, helps people understand the spatial structure and orient themselves properly to their next destination point ... Passengers feel comfortable walking around the upper floor while they engage with the signage as they stroll around the seating area.

**Departures Deck - Workshop Day 2.pdf**

*“We’ve already booked a taxi and they are in the short stay car park. They keep texting me asking where I am and I have no idea...it’s happened to me in the past where they’ve charged me extra because I was late.”*

**Final Heathrow Lift Evaluation Report - 07.08.23.pptx**

*“I noticed the numbers for the gates descending coming down here, so that threw me off a little bit.”*

**Tobii - Heathrow Wayfinding T3\_CLIENT v1.1**

Navigation challenges. For some it’s unclear how navigation through a busy and chaotic terminal [in an autonomous wheelchair] space might work, citing potential safety concerns.

**Horizon x Human8 Autonomous Wheelchairs Final**

Wayfinding represents one of the most tangible areas where airport design can directly influence travellers’ sense of comfort and calm and support their wellbeing needs. While wayfinding can be enhanced by technological solutions such as multimedia displays and biometric corridors that provide personalized navigation, or through the attentive guidance of mindful staff, it should remain as intuitive as possible. When travellers can easily orient themselves, their cognitive load decreases, leading to lower stress levels and a more positive emotional state. This creates the right conditions for them to fully appreciate the journey that airports have carefully designed. It also helps explain why satisfaction indicators such as “ease of making connections” and “clarity of signage to access the terminal” consistently rank among the top drivers of satisfaction for ASQ award-winning airports.

**2026-ACI-ASQ-Global-Traveller-Survey-Report**

Listed below are the reports which provide the insight for each theme, and the evidence score, which gives an indication of the overall strength of evidence.

'Predictable & Reliable Journey' Themes:	No. reports with supporting evidence	Evidence score *
<b>Easy &amp; Quick</b>		
<ul style="list-style-type: none"> <li>Smooth progress and punctuality</li> </ul>	193	1035
<ul style="list-style-type: none"> <li>Easy airport to access, move around, and exit</li> </ul>	188	1015

• Speed of progress	167	901
<b>In control of my own journey</b>		
• Clearly, consistently and fully informed	175	950
• Empowered to make the right decisions	108	603
• Add-on services to facilitate journey	49	255
<b>Find my way around</b>		
• Signage	112	610
• Flow, direction, wayfinding and orientation	90	494

\*The evidence score assigns a value to each report based on the ‘quality score\*\*’ for that report. The values for all the reports contributing to each theme are then added together to provide the evidence score.

\*\*The quality score is based on the rating of robustness and relevance for the report content - detailed in Methodology (section 2).

▲ Indicates higher rank position since stages 1-5

## Quality of the evidence

<b>PREDICTABLE &amp; RELIABLE JOURNEY</b> Referenced in 314 out of a total of 503 reports	
<i>Detailed analysis conducted using 270 key reports</i>	
6	141
5	129
4	40
3	3
2	1

Both the quantity and quality of the data and insight are generally strong, including a number of highly rated reports that focus specifically on access to/from Heathrow. Almost all reports touch on this need area across different stages of the consumer journey – along with ‘Basic Comforts’ it is consistently the need bucket mostly commonly discussed across the reports (314 reports across all stages). More recently commissioned reports have given a good understanding of the increasing expectations relating to using technology to aid

passengers through the airport experience and how this has endured post-pandemic.


## Themes within this need area



The themes uncovered in the reports are evidenced in more detail below.


**Key:**

**(H) identifies a passenger type or journey stage with heightened relevance to this theme / need**

**(E) identifies a passenger type or journey stage that is exclusively relevant to this theme or need (the theme / need ONLY applies to them)**

Theme	Needs & expectations within the theme	Key passenger groups	Key journey stage
<b>EASY AND QUICK</b>			
<b>1. Smooth progress and punctuality</b> 	<ul style="list-style-type: none"> <li>Flight and surface access punctuality</li> </ul>	Frequent fliers (H) Business (H)	NA
	<ul style="list-style-type: none"> <li>Baggage arrives on time.</li> </ul>	<i>No specific groups highlighted</i>	Baggage reclaim (E)
	<ul style="list-style-type: none"> <li>Seamless journey / smooth transition between journey stages, no bottlenecks (supported by new technologies).</li> </ul>	Business passengers (H) Connecting passengers (H) Using London transport system (for the first time) (H) Those living in rural areas (H) PRS (H) Special Assistance (H)	Paddington to HEx (H) Transport interchanges (London) (H) Train stations (location) (H) Arrivals (H) Connecting long-haul (H)
	<ul style="list-style-type: none"> <li>Minimal processes/ fewest steps in the process.</li> </ul>	Foreign (e.g. Chinese, American) (H) Connecting passengers (H) Business passengers (H) Frequent flyers (H) PRS (esp. cognitive personal circumstances)	Connecting (H) Immigration (H) Foreign Exchange Kiosks (H)
	<ul style="list-style-type: none"> <li>Clear procedures/ processes (e.g. liquids - what can be bought at duty free that cannot be taken through security).</li> </ul>	Non-EU (H) Elderly (H) PRS (esp. cognitive, psychological personal circumstances) Infrequent flyers (H) Non-English speakers	Departures (H) Connecting (H) Security (H)
<b>2. Easy airport to access, move around, and exit</b>	<ul style="list-style-type: none"> <li>Quick and convenient mode of transport for getting to each journey stage.</li> </ul>	VIP (H) Families (H) Larger groups (H) First time to Heathrow (H) PRS incl. those with unseen personal circumstances (H) Those with large or heavy luggage (H) Those on early or late flights (H) Those in rural areas / long distance away from airport (H)	Surface access Onward travel
	<ul style="list-style-type: none"> <li>Manageable and easy airport to move around.</li> </ul>	Families (H) esp. small children Those with large luggage (H) First time to Heathrow (H) PRS (H) Connecting (H) VIP (H)	Connecting via security (H) Changing terminals when connecting (H) Walk through Duty Free (H)

	<ul style="list-style-type: none"> <li>No long queues.</li> </ul>	UK business Connecting passengers (H) Elderly (H) PRS esp. psychological/ cognitive personal circumstances (H) VIP (H)	Check-in / bag drop (H) Connecting (H) Security (H) Immigration (H) Boarding (H) Baggage reclaim (H)
	<ul style="list-style-type: none"> <li>Do not have to walk long distances.</li> </ul>	Connecting (H) PRS (H) Elderly (H) VIP (H)	Connecting (H) Terminal 2 (H) Journey from HEx to T2 (H) Walking to gate (H) T2 walking to B-Gate (H)
	<ul style="list-style-type: none"> <li>Mobility assistance. </li> </ul>	PRM (E) Elderly (E)	Departures (H) Disembarking (H) Connecting (H) Security (H)
<b>3. Speed of progress</b>	<ul style="list-style-type: none"> <li>For many consumers shortest possible journey time / speed is a critical demand (e.g. quickest mode of surface access, seeking add-on services).</li> </ul>	UK business (H) VIP (H) Connecting passengers (H)	Journey to airport (H) Stations – walking time to platform (H) Check in / bag drop (H) Connecting (H) Travelators (H) Baggage reclaim (H) Arrivals (H) Carparking (H)
	<ul style="list-style-type: none"> <li>Other consumers emphasise moving at their own pace and not feeling rushed or pressured.</li> </ul>	Leisure passengers (H) Older passengers (H) PRS (H) Families (H) Less experienced fliers (H)	Check in / bag drop (H) Security (H)
	<ul style="list-style-type: none"> <li>Short wait times (not relating specifically to queue/ queues moving fast).</li> </ul>	UK business (H) PRS (H) Cultural differences – US passengers (H) 	Immigration (H) Flight disembarkation (H) Security (H) Baggage reclaim (H)
<b>IN CONTROL OF MY JOURNEY</b>			
<b>1. Clearly, consistently and fully informed</b>	<ul style="list-style-type: none"> <li>Clear instructions about navigating processes, rules and procedures (e.g. security requirements) through multiple channels.</li> </ul>	Connecting passengers (H) Non-English-speaking (H) First time visitors (H) PRS – cognitive personal circumstances (H)	Security (H) Self-service process points (H) Connections (H) Immigration (H)
	<ul style="list-style-type: none"> <li>Clear, consistent and prompt announcements / information (incl. when journeying to &amp; from the airport).</li> </ul>	Non-English-speaking (H) First time visitors (H) Delayed passengers (H) Connecting passengers (H) PRS (H) Elderly passengers (H) Solo passengers (H)	Traveling to/from the airport (E) Departure (H) – flight status board, going to gate, when connecting (H)
	<ul style="list-style-type: none"> <li>Right level of detail (i.e. not overloaded with information).</li> </ul>	Non-English-speaking (H) First time visitors (H) PRS – cognitive personal circumstances (H)	Post-arrivals (OTZ) (H)
	<ul style="list-style-type: none"> <li>Advance information regarding your journey /</li> </ul>	Connecting passengers (H) International and UK business passengers (H)	All journeys

	information as early as possible (e.g. which gate).	Non-English-speaking (H) First time visitors (H)	
<b>2. Empowered to make the right preparations and decisions</b>	<ul style="list-style-type: none"> <li>The right information at the right time to enable planning and best use of time (e.g. traffic information, wait times, time to gate).</li> </ul>	Connecting international business passengers (H) Connecting long-haul passengers (H) Families (H) Premium passengers (H) Non-English-speaking visitors (H) First time visitors (H) Non-frequent flyers (H) Under-25s (H) Over-65s (H) PRS (H)	Pre-journey (H) Planning transport to / from airport (H) Connecting (H) Arrivals (H)
	<ul style="list-style-type: none"> <li>Live updates throughout journey.</li> </ul>	Delayed / disrupted passengers (H)	Security (H) Immigration (H) Check-in/Bag-drop (H) Baggage reclaim (H)
	<ul style="list-style-type: none"> <li>Personalised information (e.g. ‘alerts’ via apps to ‘go to gate’, connection notifications, baggage notifications).</li> </ul>	Connecting international business passengers (H) Connecting long-haul passengers (H)	Onward travel (OTZs) Baggage reclaim (H)
	<ul style="list-style-type: none"> <li>Screens which are clear and relay the appropriate amount of information about journey.</li> </ul>	PRS (H)	Post-arrivals (OTZs) (H) PRS longes (H) Arrivals hall (H) Connecting (H)
<b>3. Add-on services to facilitate journey</b> 	<ul style="list-style-type: none"> <li>Pre-journey services to bypass / expedite in-journey processes (e.g. pre-authorisation, bag drop etc)</li> </ul>	<i>No specific group highlighted; increased need across all passenger segments</i>	Hex Departures (H)
	<ul style="list-style-type: none"> <li>In-journey services to expedite key processes (e.g. fast track, virtual queuing, meet and greet orientation)</li> </ul>	UK business (H) Premium (H) PRM (H) Families (H)	Departures (H)
<b>FIND MY WAY AROUND</b>			
<b>1. Signage</b>	<ul style="list-style-type: none"> <li>Clear and simple signs for navigation, facilities and to reassure / instruct. Signage early / soon enough to be useful and acted upon.</li> </ul>	Connecting passengers (H) Non-English speaking (H) PRS (need to consider sensory personal circumstances) (H) Infrequent travellers (H) Families – incl. for children (H)	Forex kiosks (H) Walk through Duty Free (H) Departure lounge (H) Security (H) Tunnels to gates (H) Post-arrivals (H) Arrivals hall (onward travel) (H) Connecting (H) Drop and Ride (H) At lifts (H)

			Transfer terminals when connecting (H) Forecourt (H) Elizabeth line (H)
	<ul style="list-style-type: none"> <li>Screens, signage via app / mobile devices, which are clear and relay the appropriate amount of information about journey.</li> </ul>	<i>No specific groups highlighted</i>	Post-arrivals (OTZs) (H) Arrivals hall (H) Bag collection (H) Connecting (H)
<b>2. Flow, direction, wayfinding and orientation</b>	<ul style="list-style-type: none"> <li>Passengers able to locate themselves at each stage.</li> </ul>	<i>No specific groups highlighted</i>	Surface access hubs (H) Walk through duty free (H) Tunnels to gates (H) Post-arrivals (H) Lounge (H)
	<ul style="list-style-type: none"> <li>A good sense of flow and direction when navigating across all journey stages / Clear, intuitive wayfinding (e.g. not think going in the wrong direction).</li> </ul>	Families (H) Premium (H) Business passengers (H) Connecting passengers (H) PRS with cognitive, psychological and sensory personal circumstances (H) Non-UK passengers, tourists (H)	Surface access hubs (H) Walk through Duty Free (H) Departure lounge (H) Going to gate (H) Connecting (H) Arrivals (H) Immigration (H) Baggage collection (H)
	<ul style="list-style-type: none"> <li>Good 'sightlines' to help wayfinding.</li> </ul>	<i>No specific groups highlighted</i>	Arrivals (H)

### Relating the theme to consumer journey and key passenger groups

Few of the themes within the 'Predictable & Reliable Journey' need are exclusive to one journey stage or passenger type. However, a number of passenger groups have heightened needs in relation to this theme including;

- Passengers requiring support** (including those with cognitive, sensory or psychological issues, or elderly passengers) and **families** can have heightened needs to be able to access and move through the airport easily, with assistance where necessary. This includes moving at their own pace and having smooth and unstressed access. Having the right information at the right time to enable forward planning is an important need as it allows passengers to plan as best as they can for their trip and alleviate stress. This is particularly important for these groups as they may need to book additional assistance. This needs to be balanced against not overpowering consumers with 'information overload' and unnecessary detail, which is particularly important for those experiencing cognitive, sensory or psychological personal circumstances.
- Non-English-speaking visitors and tourists** especially need clear and timely information and announcements and to have clear processes through immigration and security. They also see particular advantages in self-service processes, and some cultures show heightened expectations for convenience. For these consumers there is also a need to make provision for information and signage in different languages or using universally understood cues.

- **Business/Premium/VIP passengers** who need to plan and optimise the amount of time they have available for other activities. Speed and smooth processes are paramount here, so the fast-track services are particularly appreciated by these groups.
- **Passengers who are connecting:** signage and particularly wayfinding is key – they are looking to make smooth and seamless progress due to their time constraints.
- **Those with low levels of experience** in visiting Heathrow in general also have heightened needs, such as under-25s, anxious travellers, non-frequent flyers and first-time visitors who particularly need clarity about navigating the airport and ensuring clear processes through security and immigration.

### Changing needs to monitor

#### Elements supporting frictionless travel

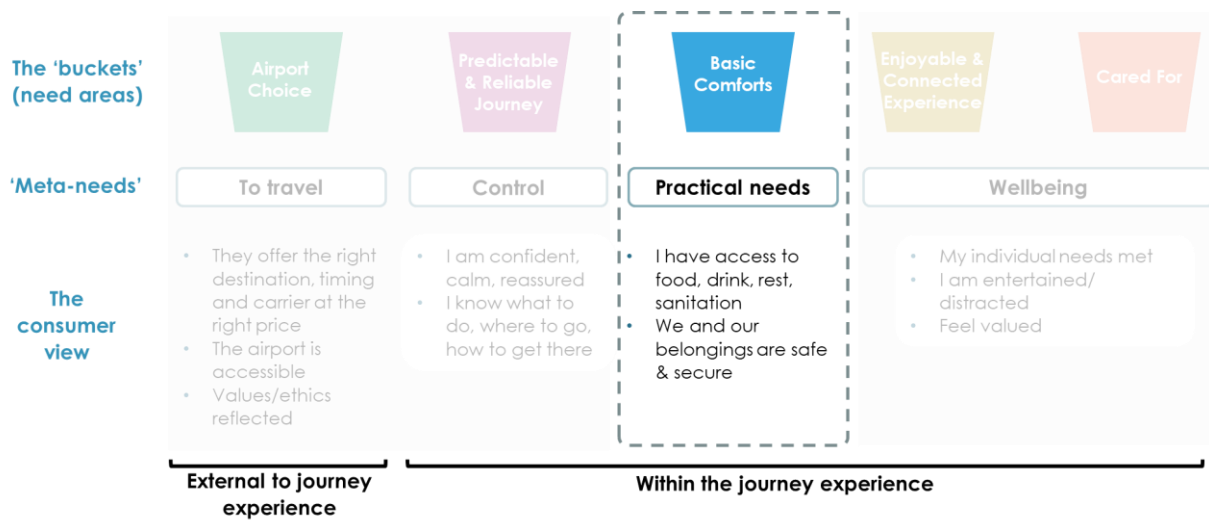
'Add-on services to facilitate my journey' exemplifies consumers' increasing focus on efficiency and a growing appetite for seamless travel and having greater control over the journey experience. As well as understanding what expectations consumers have for initiatives, it will be essential to monitor how needs evolve while financial pressures persist, given some services must currently be paid for (e.g. fast track).

### 4.3. BASIC COMFORTS

#### Introduction

‘Basic Comforts’ reflect the services and facilities that passengers using Heathrow Airport are most likely to need, irrespective of circumstances e.g. whether they are departing, arriving, connecting; or travelling for business or leisure. These needs apply both within the airport, and in travelling to and from it. From a consumer perspective, this need can be paraphrased as:


*‘My basic comforts are met so that I feel comfortable and secure’*



The type of needs (or ‘themes’) reflected in this need area are mainly practical and include some of the most basic human needs for shelter, sustenance and hygiene. However, ‘Basic Comforts’ is comprised of much more than fundamental human requirements, reflecting instead a wide range of facilities and services that today’s passengers expect from an airport to feel comfortable.

Part of feeling comfortable relates to passengers keeping themselves, their group, and their belongings safe and secure. It is not therefore surprising that ‘Basic Comforts’ can be more accentuated depending on the passenger type (notably families, people with special assistance needs and VIPs).

In terms of how ‘Basic Comforts’ relate to satisfaction, in marketing-speak these are ‘hygiene factors’ and simply expected. In other words, any lack of provision of the basics will cause dissatisfaction whilst the smooth delivery of service to meet the ‘Basic Comfort’ needs is unlikely to increase satisfaction. Notably, ‘Basic Comforts’ relate to all parts of the journey – including surface access – and their perceived or actual provision (or lack of) can impact travel choices.

 As described in the previous section, many reports in Stage 6 reference passenger expectations for digital and automated options to support a seamless, low-effort journey. There is evidence to suggest that some passengers are apprehensive about the use of personal information collected as part of automated processes and consumer needs will likely change as technology evolves. The impact of financial pressures on consumer needs for on-airport purchases, for example food and drink, should also be monitored.

Brilliant Basics: All passengers are seeking: (1) Convenience, including a convenient location as well as a fast, efficient service; (2) Comfort, including comfortable seating, as well as brand / cuisine familiarity; (3) Value for Money, although different typologies have different price points.

**180219 - Heathrow Space Desirability\_presentation\_updated-sent FINAL**

### Overview of the themes identified within 'Basic Comforts'

The themes identified within '**Basic Comforts**' are listed below and fall into three categories:

- A. My basic physical and emotional needs.** This encompasses a long list of the essentials needed both in the airport and on the way, both to and from.
1. 'Places to sit, relax, rest, wait': which for some is about finding peace and quiet, while for others is about socialising spaces. Not only must there be enough seats, but these must also be comfortable. Whilst important to all passengers, those using premium lounges have a particular expectation that they will have a place to sit, having paid for an enhanced experience, and there is an increased need for suitable places to rest amongst older passengers and those with mobility issues. The importance of having a comfortable place to wait is particularly pronounced during travel disruptions and when the airport is crowded. The location of seating is also important to certain groups, with parents needing to be able to monitor children in child-specific facilities such as soft-play, and those travelling on business wanting access to desks and charging outlets. PRS individuals express a need for dedicated seating areas. This theme is also about places to wait which are dry, safe and comfortable during the journey to the airport (i.e. surface access).

20% of connecting passengers think Airline lounge facilities is an aspect that needs to be improved.

**2021 IATA Global Passenger Survey 8232-08 Report.pdf**

*'It would be nice to know that if you had a wait the seating was comfortable. You could sit, relax, enjoy a snack, and read. The worse thing when waiting is sitting on uncomfortable chairs or in crowded places that are not relaxing.'*

**Horizon Arrivals Information Report v2.0 March 2022.pptx**

*'My train station isn't very good at all. There's no shelter or waiting rooms, so getting to the airport in the winter wouldn't be very nice. This would be a very bad start to my holiday.'*

**Western Rail access to Heathrow debrief FINAL.pptx**

*'Would I be able to walk on with my family and get a guaranteed seat? I know that's the case with a taxi...I wouldn't be so confident with a train.'*

**Western Rail access to Heathrow debrief FINAL.pptx**

On the type of environment that passengers would want from a play area:  
'space for children to be entertained while parents can sit and relax'

**Horizon- Play Area Observation Deck Report.pdf**

Having spaces to sit, relax and enjoy is a core need... This manifests through a desire for:

- More seating – particularly in the IDL, which often feels overcrowded and difficult to find adequate seating
- Zoned off areas – sections of smaller seated areas for passengers to sit and relax. For business passengers, adequate charging outlets or desks.

**Horizon x Human8 Future Airport Needs v1.0**

[PA] Customers don't necessarily have grandiose expectations for PA waiting areas; they can be seen just as 'pass-through' spaces'. Their expectations for these areas resolve around basic human needs that they consider essential (access to toilets, water, chair)... Being able to rest in a comfortable space is equally critical for older customers or people with mobility impairments / injuries. Comfortable seating, space to roam and places to rest or even lie down are all considered essential.

**Waiting Areas Evaluation Research - Debrief - FINAL.pptx**

*'We hate the departure lounge: inadequate seating both in the large halls and at the gate, so there's always people having to stand. We're lucky (and grateful) to have access to a lounge so we can avoid the crowds and sit somewhere comfortably to have a peaceful snack (or meal) and drinks.'*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline  
v1.0.pptx**

*'I don't like the noise and there's so many people rushing. I can't help it, it's an airport but I'll find a quiet place. T5 is good because it has this quiet zone area.'*

**PRS Barriers Research - Research findings debrief - December 2024**

During a travel disruption when travelling abroad for leisure, which of the following could a travel provider do to help you feel most reassured?

- 23%: Access to a comfortable waiting area or lounge  
**AMADEUS - Connected-journeys\_ACIG.pdf**

On ways to cope with crowding:

- 35% Find Public Seat
- 14% Private/Paid Waiting Area

**AX25\_Airport\_Experience\_Research**

T5 highlights: Comfortable spaces – passengers remember positively times that the terminal has been clean, not overcrowded, with plenty of available seating.'

T5 pain points: 'Crowding and congestion – overcrowding in terminal spaces adds to discomfort. Disorganisation at security, lack of seating and long queues for retail spaces, restaurants and facilities are a pain point.'

**Horizon Travel Personas 2026 v3**

2. 'Clean and hygienic': both in the airport and on the way there, this theme has consistently been a basic underlying expectation, with huge uplifts in evidence for the need for cleanliness in the airport and for personal space during the COVID-19 period. Whilst the volume of evidence is now at pre-pandemic levels, it seems that there is an enduring awareness of the risk of infection at airports, with the need to protect more vulnerable passengers through maintaining a clean environment. There is a particular focus on toilets and areas for eating, as well as high-touch surfaces including seats, information displays, and security trays. Passengers are reassured by visible evidence of cleaning, such as wet floors, cleaning staff or the availability of cleaning wipes or hand sanitiser.

*'The amount of people passing through [the airport] obviously brought more rubbish, which was not able to be cleaned by the reduced cleaning crews.'*

**Insites Consulting, Consumers Perceptions towards Cleanliness post COVID-19  
July 2022.pdf**

*'I'd like to have clear information about how the planes are cleaned, and ... how often – that certain things have been properly cleaned before each new flight boards.'*

**Interim Debrief Passenger Priorities Post COVID-19 to HAL\_22102020 v1.pdf**

*'I'd want there to be a real focus on excellent hygiene across the airport, but especially places like seating areas and café areas. I want to know that the tables have been properly wiped down and cleaned after the last user.'*

**Interim Debrief Passenger Priorities Post COVID-19 to HAL\_22102020 v1.pdf**

*'Security would be a place I would worry about going as what potential germs are on the conveyor belts and boxes you put items in.'*

**Horizon Report - The Post-COVID-19 Airport Experience 21.05.20.pptx**

*'Hand sanitiser dispensers all over the place. And I really do mean all over the place - one should not have to walk more than ten yards to reach one, in any part of the airport.'*

**Horizon Report - Passengers Priorities post COVID-19 report June 2020.pptx**

*'Sort out toilet cleanliness at Heathrow.'*

**Consolidated Passenger Insights Report July 2018\_Final**

Disabled toilets can be far away and / or used inappropriately e.g. for storing cleaning equipment.

**Coach and Airports Research Debrief June 2018.pdf**

*'My expectations are that we all learned from COVID about the importance of keeping public areas clean, hygienic and uncrowded.'*

*'I think it's important to keep areas clean not just for those who are more vulnerable to acquiring an illness but as it is respectful for all.'*

*'[Cleanliness] has deteriorated to some extent. It was good post-pandemic, but I think people have gotten into the old habits and things are not as clean as before.'*

*'I expect high touch areas to be cleaned regularly throughout the day and seating areas regularly cleaned and tidied up.'*

**Human8 x Horizon Cleanliness Report 2024 Final 3.pptx**

Alongside airport giving info about flight delays, general cleanliness inside airport and bathroom cleanliness is the top ranked factor in terms of important (99% say NET important). Hand sanitiser being available is still important to 77%.

**Human8 x Horizon Cleanliness Report 2024 Final 3.pptx**

The top five drivers of satisfaction are ambiance, cleanliness, health safety, comfort while waiting at the gate area, and washroom cleanliness.

**2024-ASQ-Global-Traveller-Survey.pdf**

Passengers increasingly expect clean surroundings and the physical markers that cleaning has taken place, e.g. cleaning staff, wet floor signage. This is particularly reassuring in areas where food is consumed, and bathrooms.

**Human8 x Horizon Cleanliness Report 2025 v1**

Security remains a sensitive and high-stress touchpoint for parents. Families seek reassurance and efficiency not speed alone. Clear guidance, visible hygiene measures, and family-priority lanes would make this step feel more considerate and aligned with their need for safety and calm.

**10409 - Heathrow Premium Customers - Report VF\_C**

We know that staff availability and cleanliness rate highly as drivers of premium customer satisfaction, as does quality of food and drink.

**Premium Insights - What we know Update 25 09 FINAL**

People want to have a predictable process. They want to get through security. They want to get a nice cup of coffee. They want to have clean toilets. And they want to board their planes on time without stress. That's still the objective. But it's not always easy to get that right. Even cleaning toilets sounds very mundane, but it's essential for the passenger experience. A dirty toilet is hugely dissatisfying for a passenger.

**McKinsey - The Future of Airports - Nov 2025**

Reasons for selecting 'cares about customers' for Heathrow: *"The facilities are super clean like the washrooms and information display boards etc."*

**W3 2025 Heathrow\_Brand Deep Dive Presentation\_v3\_ClientUseOnly09.02.26**

Cleanliness: An unclean seat will often make passengers opt for a different one in the area. Rubbish on the floor is more acceptable than in the seats, and 'wet' or 'sticky' mess is seen as worse than other kinds of waste. Some passengers

request Heathrow provides wet wipes in the area, so passengers quickly can clean themselves.

**Trial Phase 1 - Report.pptx**

3. ‘The availability of food and drink & other supplies’: The evidence suggests food and beverage needs are a fast-changing area in terms of trends and preferences. While food fashion might be more relevant to the later need area, ‘Enjoyable & Connected Experience’, the need for basic, good value and familiar options, including healthy choices and vegetarian and vegan options, is key, and different cultural requirements must also be considered. Basic food options are sometimes felt lacking in airports/on flights with low cost carriers. In addition, this theme includes specific basic retail needs e.g. newsagent, pharmacy, vending machines that consumers expect will be available – and indeed some specifically wait to buy these essentials at the airport. Provisions must be available at all times, including at night, and be easy to access within the flow of the journey.

In Stage 6, there is continued evidence that perceived poor value for money of food and drink options remains a key friction point, with passengers favouring options that feel reliable and “worth it”, and in some cases reducing discretionary spend. There is also evidence that speed, visibility and ease of access are becoming more important, with time pressure driving passengers towards quick, low-effort options (e.g. grab-and-go), and frustration where availability is limited (e.g. at gates or due to queues). These needs are particularly evident among families, who prioritise easy access to essentials, and passengers requiring assistance (PRS/PRM) who may face additional barriers where refreshments and basic amenities are not easily accessible within the Passenger Assistance Service process.

Passengers crave food choices and options that they feel comfortable and safe with, and which don’t demand too much of them either in terms of decision-making or tastebuds. This means well-known brands (e.g. high-street brands for UK passengers); well-known concepts (e.g. the British pub); well-known dishes (e.g. burgers, pizza, types of pasta dish) – this is especially relevant to international passengers.

**190717\_T5\_F&B\_Debrief\_TRUTH\_presented**

*‘Lots of burgers, pizza and chips. Where’s the healthy stuff? I want more salad options.’*

**Food & Beverage Tracker Q3 2019 Final Debrief 07.11.19**

*‘They charge an arm and a leg for a small bottle of water or soft drink, because there is no real competition in LHR’*

### **Horizon - WHSmith at Heathrow Version v2 - FINAL.pptx**

Retailers and many food outlets are not open 24/7 – inconvenient for those whose connection times lead to waits in the lounge during the night.

### **Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

[Customers] want reasonable pricing, and an emphasis on available seating that's nice and ambient... Many passengers expressed dissatisfaction with the high prices and poor value for money offered currently.

### **Quick Serve Restaurants- Jul 2023.pptx**

Over 7 in 10 [72%] believe airport shopping is expensive... Airports are considered expensive universally, however, Heathrow users are more likely to view food and drink [at Heathrow] as bad value... Despite this, 73% of Heathrow users agree with the statement that they 'Often purchase (inc. food/drink) at [the] airport.'

### **Retail Value- May 2023.pptx**

Demand for/expenditure on such services has reduced due to a combination of external pressures including perceived value for money, fewer VAT savings, other inflationary pressures and 'Brexit'. Shoppers are increasingly 'purchasing essentials or preferred items elsewhere, such as local supermarkets or prior to travel, to avoid airport shopping.' These trends are also being witnessed across the F&B sector, with 'cost concerns influencing food and beverage choices, like avoiding expensive options or shifting to lounges.'

### **Summer travel behaviours- Oct 2023.pptx**

55% of surveyed passengers considered the availability for purchase of 'snack foods' as 'essential for travel' and 42% said the same of 'fresh food'... Expectations are high – travellers expect to find all the essentials they need easily within the terminal.

### **Blended Essentials Review Research - FINAL.pptx**

As the terminal feels busier, passengers become more conscious of how long each decision might take... leading them to choose options that feel quick, predictable and low-risk.

### **Food Beverage Tracker Q4 2025 Report 110225.pptx**

The widespread perception of poor value for money highlights a significant gap between traveller expectations and what industry stakeholders currently deliver.

## 2026-ACI-ASQ-Global-Traveller-Survey-Report

*'The special assistance waiting room feels isolating and lacks refreshments.'*

### 10409 - Heathrow Premium Customers - Report VF\_C

4. **'Personal space'**: the need to avoid being crowded or cramped, because this results in a less calm experience. It is often associated with service disruption and delays and usually accompanied by other unmet needs as high passenger numbers put pressure on airport processes and facilities. It also includes a need for adequate personal space on surface access. It is a heightened need for premium customers, who expect to escape crowded environments through access to a lounge.

*'Having to stay in the main part of Terminal 5 before the gate for my flight was posted is frustrating because it is very crowded'.*

### LHR - Heathrow - Customer Ease and Enjoyment Feedback - Kokoro\_Mar 20.pptx

[Barrier to coach] Nearly half agree 'I prefer to be on my own when I travel'.

### Heathrow Transport Focus Surface Access to Airports FINAL Report 29-08-18.pptx

*'I'd rather have my own little space [car] than be packed into a tube.'*

### Coach and Airports Research Debrief June 2018.pdf

*'COVID-19 conscious passengers are significantly more likely (85%) to avoid crowded spaces'*

### Insites Consulting, Consumers Perceptions towards Cleanliness post COVID-19 July 2022.pdf

Crowded waiting areas prevent practical needs being met and drives negative experiences of Heathrow's PA Passengers.

### Heathrow Passenger Assistance Service Journey Assessment Debrief 270323.pptx

*'For example before when I went to a [departures] lounge, which I'd earned through flying a lot with airlines, it was a pleasant experience in a calming environment with pleasant food. Now it's impossible to get a seat, and the food has declined dramatically. Everywhere is rammed.'*

### Horizon- Travel Intentions 2023.pptx

Due to what was coined as ‘the summer of discontent’ which saw operational issues at airports due to a shortage of workforce, which was widely reported in the news, passengers have been concerned about delays at airports, the reliability of their travel plans and whether their baggage would appear at the other end. This led to passengers arriving at the airports earlier and taking their baggage as hand baggage so that they could keep an eye on it. A shortage of staff places further stress on airport processes and capacity, leading to disruptions in services and a degraded passenger experience. It is perhaps not surprising that passengers still experience concerns over the airport experience with regards to long waiting times and crowded airports.

#### **IAR Trend Report 2024.pdf**

Carol praises staff at Heathrow for their professionalism and kindness in how they approach secondary body searches, however, she does note that the sheer amount of people in one small space at Heathrow security, and long queues can contribute to anxiety.

#### **Human8 Horizon Service in Security case studies.pptx**

Perceptions of crowding are real and passengers are concerned.

66% of travelers tell us that they feel the airport is getting more crowded.

A crowded airport is more stressful and less enjoyable, invariably translating into reluctance to spend. 66% of travelers say the airport has become more crowded over the past couple of years. 29%, almost a third, say that it has got a lot more crowded.

#### **AX25\_Airport\_Experience\_Research**

[Premium customers] do not want to be or feel that they are being lumped into crowded ‘premium’ space, where anyone has access, or must travel through the main airport areas unless they choose to.

#### **10409 - Heathrow Premium Customers - Report VF\_C**

*“T5 is always cramped and chaotic. There is no way near enough space for all the passengers - it’s a horrible experience to be in.”*

#### **Horizon Travel Personas 2026 v3**

Most of all, people are looking for a place to relax. Many view IDL as an antithesis to the airplane in this regard: Before having to get onto a stuffed and noisy plane, sitting shoulder-to-shoulder with strangers, they want to sit in a comfortable and somewhat quiet environment with as much space around them as possible.

### Trial Phase 1 - Report.pptx

5. 'Digital / automated interaction available': This theme captures the expectation for digital and automated options across the airport journey, supporting efficiency and reducing friction. While initially accelerated by COVID-related needs to minimise in-person contact, it has now become an established expectation, with tools such as mobile check-in, self-service bag drop and e-gates seen as standard. Passengers continue to value a blend of digital and human interaction, with technology supporting rather than replacing the overall experience.

In Stage 6, there is evidence of continued growth in adoption and acceptance of technologies such as biometrics, digital identity and mobile-first journey management, with many passengers expecting seamless, end-to-end digital experiences. However, as in the previous stage, sentiment remains nuanced: while younger, frequent and business travellers show stronger appetite for automation, this may be lower amongst other groups, particularly older passengers and those requiring assistance. Similarly, there is emerging evidence of varying appetites across different nationalities. While automation is valued for speed, control and convenience, human interaction remains critical for reassurance, problem-solving and emotional support, particularly at more complex or stressful touchpoints. This is especially important for vulnerable passengers (e.g. PRS/PRM), where there is interest in new technologies that increase independence (e.g. autonomous assistance), but also clear need for guidance, trust and fallback support. If not working or unmanned, self-service options e.g. e-passport gates can become a source of passenger frustration.

*'I don't want to stop and check info boards for information such as which belt my bags will be on etc. That said, information sent to my phone is something I can look at whilst power walking towards Passport Control!'* **Heathrow Horizon Travel Disruption - final report v2 May 2022.pptx**

75% of passengers would be eager to use biometrics instead of passports or boarding passes.

**2022 IATA Global Passenger Survey.pdf**

As the first generation to be native of the digital world, more than six in ten global 18–24-year-olds agree that a phone/tablet enhances their travel experience (63%) and over half (56%) agree that they can't get around without their phone.

**yougov-travel-whitepaper-a4-final.pdf**

One of the key trends discussed revolved around the automation of processes throughout the passenger journey. Results showed that travellers were generally in favour of a more automated and technological experience, but with

the crucial caution that a human touch remained very much needed, notably at critical steps of the journey.

**2024-ASQ-Global-Traveller-Survey.pdf**

*"Shambolic checking in at T4 Heathrow. One and half hour to check-in. No automatic boarding passes or automatic check-in. C'mon this is 21st Century!"*

**2022 Customer Satisfaction and Engagement Review.pdf**

Overall, a majority of travellers (58%) favoured a more technological and automated approach to make their journey more fluid.

**ASQ-2023-Global-Traveller-Survey-Report.pdf**

A high proportion of passengers, 73%, are confident in using digital or online products and services, with 11%, not confident or avoiding using digital or online products and services (in particular over 65 years-old). The younger the passenger, the more confident they are in using digital or online products and services. Many comments regarding the use of digital devices (at check-in, security, border control) indicate that there is still the need for staff to assist/reassure in the use of digital services.

**ACI EUROPE Survey on the impact of digitalisation and automation on the passenger experience – RESULTS**

Passengers don't think in segments. They expect journeys to work like the rest of their digital lives: one tap, one log-in, one flow.

**SITA - Passenger\_Report2025\_ACIG.pdf**

There is notable passenger anxiety about how [autonomous wheelchairs] would work in practice... and how they would acquire support if needed whilst using them. [...]. *"I really like the idea... it gives the person the autonomy and independence that many disabled people crave... without having to rely on an assistant."*

**Horizon x Human8 Autonomous Wheelchairs Final**

When asked whether they would consider using biometric gateways so there's no need to stop and show a passport or even a mobile phone (i.e. using face or fingerprint scanners to let you pass through airport security), an average of 69% of global travelers said they would... while this differs only slightly across generations, to a factor of no more than 10%, there are clear cultural divides with 88% of Chinese travelers agreeing that they would, but as few as 54% of French passengers taking this stance.

**AMADEUS - Connected-journeys\_ACIG.pdf**

6. **‘Privacy’**: This code encompasses both data privacy and personal privacy more generally, relating to physical space, exclusivity and separation from crowds – a basic need for VIP consumers. There is evidence to suggest that some passengers are apprehensive about the use of personal information collected as part of automated processes. Key concerns include misuse, unauthorised sharing and data breaches. Given the increasing usage and importance of digital services and automated processes, data privacy is a key area that needs further monitoring.

In Stage 6, there is continued evidence that privacy and data security concerns remain a barrier to full adoption of digital and automated services, particularly in relation to biometrics, digital identity and public Wi-Fi. While many passengers are willing to share data in exchange for improved convenience and more seamless journeys, this is increasingly conditional on clear safeguards, transparency and control, with trust lower where visibility is limited. These concerns appear more pronounced among older and less digitally confident passengers, though remain relevant across segments. At the same time, there is emerging evidence of a broader need for privacy among premium passengers, potentially driven by increased use of traditionally exclusive spaces (e.g. lounges) by a wider range of travellers, as more passengers seek to enhance their journeys, as seen in the Enhanced Personal Comforts code.

9 in 10 passengers do not have any privacy concerns about the principle of collection and use of biometric data to measure security queues. Of the total sample, 2.1% have privacy concerns about the collection of their biometrics, regardless of the proposed safeguarding measures.

**Biometric Security Queue Measurement - Epinion Final Report - 20171009.pdf**

Far from being worried about AI taking their jobs, Chinese people see the increased efficiency and convenience a huge plus. Happy to pass over their data as they know it will improve services in the long run.

**Heathrow Culture and Trends Review, November 2018 .pdf**

*‘For security, yes, as long as it not used for anything else.’*  
*‘You never know who can hack into the system and the integrity of data security.’*

**Biometric Security Queue Measurement - Epinion Final Report - 20171009.pdf**

*‘I should be extremely annoyed if I thought a commercial operator had any access to biometric data for any purposes other than those it is contracted to fulfil by government.’*

**Horizon Report – Biometrics**

On the whole, very few respondents were unhappy with the idea of airports using personal data to quicken the security process.

### **Designing an Airport for Future Generations - Debrief FINAL SHARED**

70% of travellers are concerned about the “Misuse of my personal information”, 66% around the “Security of the information (e.g., data breach, where and how data are saved)”, and 58% about “Access to the information (data shared with unauthorized entities without my approval)”... 20% of respondents mentioned that sharing personal information was a barrier since they prefer to deal with airport staff directly, showing there is still work to be done to communicate the benefits of automating the journey... When asked about the perceived benefits that would entice them to share personal information during their travel journey, respondents are mainly interested in doing so for “Arriving at the airport ready to fly, as check-in and pre-clearance would have been done remotely.”

#### **2024-ASQ-Global-Traveller-Survey.pdf**

Data breaches, sharing data with third parties and lack of information about how data is handled/used are the top three concerns related to the use of biometrics at the airport. Also, not knowing how long data will be stored, how it can be deleted. People aged 25 and under (31%) are concerned about a lack of knowledge about data storage.

#### **2023+IATA+Global+Passenger+Survey+-+Report.pdf**

Top concerns with using biometric information when travelling are: loss of data due to data breaches (56%), lack of knowledge of who the passenger data is being share with (52%) and not knowing how the passenger data is being stored or handled (51%).

#### **global-passenger-survey-2022-media-briefing**

European passengers are more cautious about using digital solutions and sharing personal information to enhance their travel experience, and are least likely to share biometric data to speed up processes, and when they do, they are less satisfied than travelers from other regions.

#### **gps-2024-highlights**

Main concerns when it comes to biometric identification: Data privacy/security (54%), data misuse (44%), potential for identity theft/fraud (44%), data sharing with other parties (32%)

#### **SITA - Passenger\_Report2025\_ACIG.pdf**

Consumers are increasingly open to sharing data in exchange for better experiences, but in return, they demand transparency, control, and strong safeguards.

### **2026-ACI-ASQ-Global-Traveller-Survey-Report**

Premium Elites want to feel set apart from the crowd, enjoying privacy, distinction, and personalised service that reinforces their elevated status.

### **10409 - Heathrow Premium Customers - Report VF\_C**

7. 'Infrastructure suits my specific accessibility needs': A new theme in Stage 5, this focuses on the requirement for essential elements of the passenger journey to be accessible to all passengers. While many of these are well-recognised, including accessible check-in desks, wider security lanes, and accessible toilets, less visible requirements include quiet rooms for travellers with sensory sensitivities and privacy screens for those who may need them during security processes. In particular, those using Passenger Assistance Services need infrastructure which is thoughtfully designed to address their needs at every stage of their airport journey -from the moment they arrive at the airport to boarding the plane, with easy access to basic amenities such as accessible toilets and food and drink from within Passenger Assistance-specific areas. This code also includes requirements for passengers travelling with children.

*'As I am disabled and often travel solo it is usually the airport part which is the hardest for me within my journey, there are never any low level check-ins and the information I need to provide regarding my mobility scooter has never been passed to the check-in staff so I have to provide it again, and that's before I get to managing luggage and getting through security which is a whole different level, particularly having to get half undressed including removing shoes in security - so a bit of help would be great, I don't need assistance to the gate but need it in other ways which isn't often offered as an option, once through security it's fine as long as I can weave in and out of the crowds and don't need to buy anything as none of the shops or stores are really accessible, just getting a coffee is difficult and really hard to manoeuvre in and out.'*

### **Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

With a designated trial lane, these [PRM] passengers felt going through security search was easier, efficient and more professional... *'It felt well*

*thought through: big blue assistance sign, geared up for chair users, privacy screens etc.'*

**Final PRS PRM Security Lane Trial T2\_Caroline Thompson findings v1.pptx**

On the 'specific kinds of assistance those with a disability would need or think about when flying', 38% of respondents highlighted 'Access to 'quiet' rooms or lounges for those with anxiety or sensory issues.'

**civil-aviation-authority-aviation-consumer-survey-wave-12.pdf**

PRS passengers express higher satisfaction with the security service in the new PRS-specific trial lane when compared with the control group using the non-trial lane... The trial lane generally has a more positive attitude towards the process, employees, and easiness.

**T2 PRS Security Trial - Final Report.pptx**

Some PA customers are not offered PA assistance from check in and have to make their own way to the PA area - this should be offered proactively and be near to the check-in desk. Those with severe mobility issues struggle right from arrival to check in and most who complain of difficulties don't know about PA.

**Heathrow Passenger Assistance Service Journey Assessment Debrief 270323.pptx**

*'The service was good enough except from the front door to check-in. It was hard to access PA as the desk is too far away. They should put it at the airport entrance.'*

*'After check-in we had to go to a different floor for the special assistance place and get a wheelchair. You would expect someone to be there to help when you arrive rather than us having to go and look for them.'*

**Heathrow Passenger Assistance Service Journey Assessment Debrief 270323.pptx**

Current retail environments often overlook parents with small children. Crowding and lack of accessibility discourage engagement, meaning airports miss potential commercial value. Creating welcoming, stroller-accessible layouts and family seating could encourage longer, more relaxed stays.

**10409 - Heathrow Premium Customers - Report VF\_C**

*'Here's one more example of what I mean by hardware: airports could offer autistic passengers a dedicated sensory room that would help them feel comfortable traveling, so the two hours spent in a terminal wouldn't be as stressful.'*

**McKinsey - The Future of Airports - Nov 2025**

The 'basic physical and emotional needs' within this area of 'Basic Comforts' also encompass a number of other specifics:

8. Air quality – clean air, not stuffy, and the right temperature.
9. A place to smoke – while only a single mention in Stage 6, previous evidence suggests that smokers consider outdoor smoking areas a valuable amenity, but would expect a dedicated zone that is centrally located and close to departure gates.
10. The provision of wheelchairs and (golf) buggies for people unable to walk far (which can include families with young children) – in Stage 6, there is emerging evidence that autonomous wheelchairs are welcomed as a way of enabling disabled passengers to have greater independence.
11. Faith and spiritual needs: Spiritual wellbeing; appropriate food and drink options for different religions and ethical outlooks; prayer rooms.

**B. My belongings:** as well as their physical needs, consumers are thinking about their things; their devices, luggage and personal belongings, and money.

1. **'Luggage and personal belongings':** other needs relate to the careful handling and safety of luggage and other belongings – such as pushchairs and wheelchairs – as well as knowing what is compliant in hand luggage (to avoid confiscation). Beyond safe handling of luggage, it also includes providing passengers with peace of mind that their belongings have not been lost. Some passenger groups have particular challenges – families with lots of luggage and/or small hands to hold, and passengers with mobility or other disabilities. Being able to move luggage through the process – including surface access – is important with step-free access and capacious luggage racks mentioned.

There is continued evidence at Stage 6 that lost, delayed or damaged hold luggage causes significant anguish, and that there is appetite among passengers for electronic tracking.

*'I found it quite hard to work out the baggage rules for what is allowed in hand luggage - liquid, lip salve, medicines etc. I fly very rarely and was worried about getting something wrong.'*

**CAA Consumer Tracker - July 2017**

*'My wheelchair is precious – it's my arms and legs.'*  
**12th Oct Heathrow Special Assistance Open Day Presentation**

No.1 driver of overall flying experience satisfaction is 'Baggage collection at the airport in the UK'.

**CAA Aviation Consumer survey -- 5th wave report FINAL (2)**

*'Having to move suitcases around this type of journey is not easy.'*  
**Surface Access Report v2.0**

*'It would be great if I could check in my hold luggage and get my boarding card when I get on public transport, I could forget about it until I arrive at my final destination. It would make travel and airport experience so much more relaxing.'*

**Horizon Report Surface Access October 201**

81% (+8pp vs. 2021) are more likely to check-in bags if it can be tracked at all times. 51% would be interested in a baggage information service. 50% have used and would be interested in using an electronic bag.

**global-passenger-survey-2022-media-briefing**

*'The bags ... are misplaced which they couldn't find for more than an hour. Passenger and [their] students were really frustrated with the baggage guys.'*

**Passenger Segments Review 2023.pptx**

*'I travel a lot, checking baggage is at least an extra hour added to each trip, sometimes more. If baggage gets lost - it is very painful to get it back and manage with the missing items whilst that happens.'*

**Horizon- Travel Intentions 2023.pptx**

*'My husband's luggage was lost 7/17. He has filed a claim and followed up numerous times. The customer service is absolutely terrible and no help at all. What is being done to get the backlog of luggage at Heathrow to the rightful owners?'*

**2022 Customer Satisfaction and Engagement Review.pdf**

*'My luggage never arrived on carousel at Heathrow airport on 9th June. Since then @HeathrowAirport and @eurowings have been passing the buck and refusing to help me. Each blaming the other. One of them has my case and contact number from my ticket! Absolute joke!!!'*

**2022 Customer Satisfaction and Engagement Review.pdf**

Fast retrieval and delivery in the event of mishandled baggage, along with real-time tracking capabilities, would significantly boost most travelers' confidence in traveling with checked-in baggage. However, passengers have mixed feelings about their luggage traveling on a separate flight ahead of them.

**2024 IATA Global Passenger Survey Combo- 8234-11 Report**

Top 5 frustrations of PRM: Equipment concern: concerns over the handling and storage of personal mobility devices, especially if they've encountered issues in the past.

**Horizon x Human8 Autonomous Wheelchairs Final**

Flight delays or cancellations based on circumstances outside of their control are the number one source of anxiety [for business passengers], followed by a fear that misplaced baggage might affect their professional appearance.

**AMADEUS - Connected-journeys\_ACIG.pdf**

Among those taking intermodal trips, more than a quarter (27%) rank end-to-end baggage handling as one of the most valuable smart travel services [...] 78% of travelers say they'd be willing to pay for end-to-end baggage handling.

**SITA - Passenger\_Report2025\_ACIG.pdf**

2. 'Enable my devices to work': the ability to use devices (phones, tablets, laptops) and to have reliable, fast and easy access to the internet e.g. via Wi-Fi or a mobile signal, along with power supply & charging points, is a basic requirement for most passengers – and in particular for younger passengers and those travelling for business.

For business travellers, issues such as strong Wi-Fi and smooth connections are also very important – enabling them to continue working efficiently while away from home for work.

**NATS**

*'Had a 5-hr layover - sat in the departure lounge charging my devices. Area was comfortable and clean. Lots of seating available and was able to find a charging station very quickly.'*

**TRUTH: Customer Journey Segmentation**

*'My overlay was in Heathrow: it's a very neat airport with plenty of things to look at while there and a few easy lounges with battery recharge capabilities.'*

### Consolidated Passenger Insights Report July 2018\_Final

*'As someone who travels a lot and gets to the airport early, I run out of things to do. Having better wi-fi would let me stream my shows.'*

#### **10832312 Heathrow Airport Aggregate Benefit Value Study\_Draft Report\_v0.4**

18% rate 'Poor Wi-Fi connection' as their top 5 irritants at airport; Gen Z more sensitive to this issue.

#### **2024-ASQ-Global-Traveller-Survey.pdf**

Passenger Assistance passengers want charging ports at each seat and USB ports for those who don't have adapter.

#### **Waiting Areas Evaluation Research - Debrief - FINAL.pptx (Blue Marble paraphrase)**

The dream IDL has: *'Spacious waiting areas with comfortable seating and plenty of charging points for electronic devices.'*

#### **Horizon x Human8 Future Airport Needs v1.0**

*'As a [UK, Business, arriving] traveller I need many more charging points. In [the] US they are everywhere ... seats, and at all points of [the] airport journey.'*

#### **Passenger Segments Review 2023.pptx**

*'The charging is very slow and not 'fast charging' as advertised. I've been using the wireless charger for 15-20 minutes, and my device has only increased by 20-25%. It would also be helpful to have longer cables so I can sit here and use my device while it charges.'*

#### **Epinion - Personal Digital Device Charging - Report - 04-03-2025 1**

One of the most important indicators is satisfaction with the airport's free Wi-Fi service, as good connectivity has become a basic expectation among travelers in any airport...[there are] passenger expectations of reliable, fast, and easily accessible Wi-Fi at every point in their journey.

#### **Report - T5 Wi-Fi Research.pdf**

At a more granular level, the greatest gaps between ASQ Award-Winners and other airports are identified for the following service quality items, which have also historically received the lowest scores:

- Entertainment and leisure options
- Availability of charging stations

- Value for money of restaurants/bars/cafés
- Value for money of shops
  - Shops

### 2026-ACI-ASQ-Global-Traveller-Survey-Report

3. ‘Money and foreign currency readily available’: Evidence from previous stages demonstrated that some consumers need to acquire cash for their travels at the airport, either via Foreign Exchange or cashpoint machines. Arranging Forex at the airport is widely associated with poor exchange rates and high charges, with the need for airports to innovate or become more competitive to satisfy consumer needs. However, this area appears to be changing as travellers adopt travel money cards and mobile currency apps, and use cashless when travelling to developed destinations and/or urban centres – a particular trend for those travelling for business as a way of simplifying expense claims. While previous evidence suggests consumers believe that there will always be a place for cash when travelling abroad, and that the airport is a convenient place to exchange currency, the only report in Stage 6 which mentioned transactions abroad focused on card payments.

*‘I want to use cash as I forgot to tell my provider before I left Toronto and I can’t risk my card getting blocked.’*

**Heathrow F&B Qualitative Interviews Q3 2020.pptx**

*‘I want to have it all sorted by the time I get to the airport. People say you don’t get a good rate at the airport.’*

**1-2-18 CTA Travelex Heathrow Qual Findings**

*‘I use Revolut. The rate is much more competitive, it’s very transparent, and you can top it up very quickly.’*

**1-2-18 CTA Travelex Heathrow Qual Findings**

Many Consumers envisage that foreign currency cash will play a supporting rather than key role to cards and e-wallets/money cards in the future. They will need to get foreign currency out in cash less often as the market develops.

**CTA Travelex Heathrow Qual Findings**

Only 9% of passengers exchanged cash at the FX desk on the day of departure ... it is seen as a 'last' option for those who forgot to make preparations prior to the airport ... it is seen as a contingency for emergencies.

**23-008015-01 - Heathrow Future of FX Report - V3 - April 2023- Internal and client use only.pptx**

On the need for FX services, 73% of respondents 'net agree' that there 'Will always be a need for cash when travelling abroad' but 65% 'net agree' they 'Don't trust I will get the best FX rates at the airport'. 35% of respondents 'net agree' that 'Not all local currencies are available at FX at the airport'.

**23-008015-01 - Heathrow Future of FX Report - V3 - April 2023- Internal and client use only.pptx**

On the specific needs of business passengers for FX services, *'I'm travelling to Norway for a business trip. I use a company credit card to help stay on top of my expenses, cash would be too confusing to expense back as I would need to keep all the receipts.'*

**23-008015-01 - Heathrow Future of FX Report - V3 - April 2023- Internal and client use only.pptx**

In the evolving landscape of travel, payments are a strategic enabler of seamless, personalized journeys. Whether booking a flight, upgrading a hotel room, or navigating airport services, travelers expect payment to be fast, secure, and invisible.

**AMADEUS - Connected-journeys\_ACIG.pdf**

**C. Personal safety and feel secure:** finally, consumers are thinking about their own and their family's health and wellbeing.

1. **'Safety':** the focus of this code is on the operation of safety procedures at the airport; clear safety briefings to passengers; and knowing that the environment generally is safe. Safety needs can be heightened not only by a health crisis but also when delays or other problems occur. Certain passenger groups also tend to be more anxious about safety risks, such as older passengers and passengers requiring support. It should be noted that consumers frequently refer to 'safety' in relation to feeling safe from security threats – a core need which is covered in the 'Secure' code.

*'Keeping the safety and satisfaction of the passengers is a challenge just because passenger expectation is very high.'*

Airline

**Heathrow Operational Research (full deck)**

*'The safety issue is the main thing. Sleep in a hall with children? No way.'*

Australian resident, starting home with children aged 4 and 6 years.

**Caroline Thompson: Passenger Welfare Revisited**

No matter what the core needs of a young person were, when it came to the airport, safety was the number one priority.

**Designing an Airport for Future Generations - Debrief FINAL SHARED**

*'I don't like the tall escalators. I suffer from vertigo so it's really hard.'*

**Escalator Behaviours Presentation\_Observations and Qual\_FINAL.**

Passengers, especially those with heavy luggage, expressed concerns about the lack of grip and the potential for losing control on sloped surfaces, leading to potential safety risks if they cannot control or accidentally let go of luggage. Some in a hurry also run in this area. With passengers going in both directions at the ramp in T3 Arrivals, there is a sharp corner where accidents are more likely to happen. One passenger coming from T2 through the underground tunnel with a lot of luggage said she wasn't comfortable using the travelators but also felt the floor was very slippery.

**Tobii - Heathrow Wayfinding Tunnel Report T2&T3 CLIENT.pdf**

*'A lot of empty trolleys [were] left around the baggage belt, causing a hazard.'*

**Passenger Segments Review 2023.pptx**

HEX aligns closely with key values passengers have for it (85% agree it's safe, 84% cleanliness and 80% comfortable).

**Horizon- Heathrow Express Luggage Diaries .pptx**

*'There are times and certain airlines where I would be more concerned about my safety and personal belongings.'*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

8.6% consider 'Health Safety' the Most, 2nd Most or 3rd Most Important factor of 32 tested (12<sup>th</sup> place overall)

**LHR\_Annual\_2025\_Departures\_Annual Satisfaction Assessment**

2. 'Secure': consumers want to be secure from external threats, though this is balanced with not wanting onerous security processes, and also being reluctant to receive information about security measures because it would cause them to feel less safe. There has previously been some evidence that consumers want reassurance that new automated processes are as or more secure than non-automated approaches – although this did not feature in Stage 6.

These are sensitive topics [safety and security] and there was a reluctance to discuss them in detail. A number did not want more information about safety and security because...this may make them feel less safe.

**CAP1303 CAA Consumer Research for the aviation sector Final Report**

*'I think [non-automated methods] is more secure and an officer can tell by looking at people if they are guilty or innocent...E-gates cannot do this and I would prefer queues and be safe.'*

**Horizon Arrivals report v1.0.pptx**

*'Safety is always important, but I feel safe at Heathrow - once I am in the airport I know that all possible measures are taken for passengers' safety, and if there is something that seems to 'out of the ordinary' then I can approach a member of staff and ask. All staff members seem to care about the vast numbers of passengers 'floating' around.'*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

*'That the airport is clean, well-staffed, efficient at all points of air travel and most of all safe. Safety is always number one on my list, so Law Enforcement has to be visible since it provides an extra sense of safety and also deters crime.'*

**Human8 x Horizon Cleanliness Report 2024 Final 3.pptx**

Security is both highly important and widely accepted, reinforcing the need for passengers to feel protected and confident throughout the airport journey.

**Heathrow Acceptability Testing Technical Report - 05.02.26**

A number did not want more information about safety or security because it was felt that engaging with this may make them feel less safe. In addition, most flyers with some previous experience of security procedures (59%) feel that the right balance has been struck between screening and convenience to passengers. However, there is one area where views are more mixed – almost half (49%) agree that a lack of consistency in security procedures sometimes concerns them. The qualitative research found that these concerns related to perceived inconsistency between different airports (particularly those situated in certain other countries compared to the UK) and sometimes also within the same UK airport (e.g. related to differences in approaches by individual staff).

**CAP1303ConsumerresearchfortheUKaviationsectorfinalreport.pdf**

3. **Keeping (family) group together:** families and groups need to stay together – and the airport environment can enable this with family lanes during security and immigration, seating areas suited to groups, good sightlines to play areas and additional assistance in the event of major disruption. One area that families and groups find difficult and stressful is being channelled to the Duty-Free area straight after Security before having a chance to re-group with all clothing and belongings.

*‘And the doors weren’t too quick to close. You worry about that with children – that you’ll be split up when the doors shut.’*

**Escalator Behaviours Presentation\_Observations and Qual\_FINAL.**

Passengers with children have a few key considerations: safety of travel; allowing extra time; space on mode of transport; extra luggage (including children’s luggage); the worry of children getting lost; important amenities to consider (e.g. toilet/ food).

**Coach and Airports Research Debrief June 2018.pdf**

Families in particular need space - opportunity to regroup after security.

**Walk Through Duty Free Understanding Report v1.0**

*‘My allocated seating was scattered all over the plane despite travelling with children. I tried to let the airline know before travelling but we had to wait until we were on board the plane to sort it out. We were relying on other passengers not turning up in order to have seats moved so I could sit with my children.’*

**CAA Consumer Tracker - July 2017**

Passenger welfare encompasses personal safety and security – particularly keeping families/each family together and safe.

**Caroline Thompson: Passenger Welfare Revisited**

*‘My son is disabled and when we arrived at immigration, we were told only one of us was allowed to go through special assistance with my son. This was very disappointing as we have never been split up before. We had no choice so myself and the rest of the family went to the passport security gates. However, when my daughter aged 12 went to put her passport through on the electronic gates which wouldn’t go through, she was then told & led by a man who worked in this department to go and wait in the line all by herself without the rest of her family. I was absolutely distraught as myself & everyone else had got through and I wasn’t allowed to go back.’*

**2022 Customer Satisfaction and Engagement Review.pdf**

Facilities increasing Heathrow's suitability for Family flyers -  
 % featuring in top 5 most important elements:  
 Family Priority Security Lanes 32%, Family Priority Check In Lanes 30%,  
 Family Priority Immigration Lanes 23%

### W3 2025 Heathrow\_Brand Deep Dive Presentation\_v3\_ClientUseOnly09.02.26

The reports evidencing the 'Basic Comforts' need are listed below together with the evidence score for each theme indicating the overall strength of evidence.

'Basic Comforts' Themes:	No. reports with supporting evidence	Evidence score *
<b>Basic physical and emotional needs</b>		
• Places to sit / rest / wait	130	723
• Clean and hygienic	116	636
• Food and drink & other supplies	102	555
• Personal space	73	402
• Digital / automated interaction available	56	292
• Privacy (incl. data privacy)	44	236
• Infrastructure suits my specific accessibility needs	17	94
• Air quality ▼	16	90
• Buggies, wheelchairs, pushchairs available	13	73
• Smoking space ▼	12	67
• Faith and spiritual	8	45
<b>My belongings</b>		
• Luggage (incl. moving luggage) / personal belongings	101	536
• Enable my devices to work	85	465
• Money & foreign currency available	14	74
<b>Personal safety and feel secure</b>		
• Safety	72	391

• Secure	43	234
• Keep us together	23	127

\*The evidence score assigns a value to each report based on the ‘quality score\*\*’ for that report. The values for all the reports contributing to each theme are then added together to provide the evidence score.

\*\*The quality score is based on the rating of robustness and relevance for the report content - detailed in Methodology (section 2).

▲ Indicates higher rank position since stages 1-5

### Quality of the evidence

BASIC COMFORTS Referenced in 305 out of a total of 503 reports	
<i>Detailed analysis conducted using 263 key reports</i>	
6	140
5	123
4	37
3	4
2	1

The themes relating to ‘Basic Comforts’ appear in 305 of the reports under review – the most commented upon needs area alongside Predictable and Reliable. The way basic facilities are operated and delivered can have a substantial impact on passengers’ experience of the airport. Reports that have explored, for instance, the ambience of Heathrow and other airports, have been useful in highlighting how basic needs such as seating can

affect passenger satisfaction and how this varies by passenger type; some groups such as VIPs, connecting passengers or parents with young children have specific requirements. The evidence suggests that expectations around basic needs are increasing, with several themes in this area associated with changing trends including food and drink variety and pressured budgets, a desire for frictionless travel and the associated impact on expectations around the use of personal data.


### Themes within this need area







The themes uncovered in the reports are explored and evidenced in more detail below

**Key:**

**(H) identifies a passenger type or journey stage with heightened relevance to this theme / need**

**(E) identifies a passenger type or journey stage that is exclusively relevant to this theme or need (the theme / need ONLY applies to them)**

Theme	Needs & expectations within the theme	Key passenger groups	Key journey stage
<b>BASIC PHYSICAL AND EMOTIONAL NEEDS</b>			
<b>1. Places to sit/relax/rest/sleep/wait</b>	<ul style="list-style-type: none"> <li>The availability, range, comfort and location of seating (including en route to and from the airport).</li> </ul>	PRS (H) Premium (H) Older passengers (H) Families (H)	Surface access (H) Departure lounge (H) Tunnels and piers (H) Gate (H)
	<ul style="list-style-type: none"> <li>Places to wait, sheltered from weather (e.g. for surface access options).</li> </ul>	PRS (H) Families (H)	Surface access (H)
	<ul style="list-style-type: none"> <li>Calm ambience/environment: options away from noise, crowds, queues, bustle of retail areas; Seating to facilitate desire to create own space (or area for groups / families to regroup).</li> </ul>	VIP (H) Connecting passengers (H) Families (H)	Surface access (H) Departure lounge (H) Post security (H) Arrivals (H)
	<ul style="list-style-type: none"> <li>Lively spaces for socialising, families.</li> </ul>	Families (H)	Departure lounge (H)
	<ul style="list-style-type: none"> <li>Clean, 'not grimy', litter free.</li> </ul>		Surface access (H)
	<ul style="list-style-type: none"> <li>Comfortable seating and places to sleep.</li> </ul>	Delayed passengers (H)	Departure lounge (H)
<b>2. Clean and hygienic</b>	<ul style="list-style-type: none"> <li>Clean and hygienic environment at all steps of journey incl. surface access; All touched surfaces to be sanitized (security trays, handrails etc). </li> </ul>	PRS (H)	<i>All steps of journey- particularly where consumers touch surfaces. Departure lounge / food halls and bathroom facilities often cited</i>
	<ul style="list-style-type: none"> <li>Hand sanitizer to be available at all steps of journey (incl. surface access).</li> </ul>	<i>Universal - no specific groups highlighted</i>	<i>Entry points to all areas / stages of journey and wherever consumers touch surfaces</i>
	<ul style="list-style-type: none"> <li>Number and location of toilets.</li> </ul>	PRM (H) Infirm (H) Families (H)	Tunnels (H) Gate (H) Surface Access (H)
	<ul style="list-style-type: none"> <li>Clean bathrooms and with plenty of toilet paper.</li> </ul>	<i>No specific groups highlighted</i>	
	<ul style="list-style-type: none"> <li>Baby changing and breast-feeding area.</li> </ul>	Families (E)	
	<ul style="list-style-type: none"> <li>Additional needs for bathroom to freshen up;</li> </ul>	Long haul (E) Connecting (E) Delayed (H)	Arrivals (H)

	showers (and towels), secure place for belongings.		
<b>3. Food &amp; drink and other supplies</b>	<ul style="list-style-type: none"> <li>Basic range of familiar, easy F&amp;B options: to suit budgets, café/ restaurant /bar, type of food offer. Also, basic retail options (incl. pharmacy, news &amp; books).</li> </ul>	Families (H) (budget and choice for kids) Transferring and delayed passengers overnight stay (H) PRM passengers can struggle to access F&B at certain points e.g. surface access (H)	Lounges (H) (for VIP / premium consumers)
	<ul style="list-style-type: none"> <li>Value/budget options (shops, F&amp;B). </li> <li>Speedy/grab-and-go options </li> </ul>	Wider segment reach for Stage 5 onwards Families (H)	
	<ul style="list-style-type: none"> <li>Vending machines / drinking fountains.</li> </ul>	Environmentally conscious (H)	Gate (H)
<b>4. Personal space</b>	<ul style="list-style-type: none"> <li>Adequate personal space for all consumers at all stages (incl. surface access) – avoiding crowding or cramped spaces.</li> </ul>	Premium (H)	Throughout all stages of the journey, particularly where crowds/bottlenecks e.g. public transport (surface access) esp. Tube; Transfer buses; Check in / bag drop; Departure lounge (esp. food hall) Immigration, Security, Arrivals hall (meet and greet)
<b>5. Digital / automated interaction available</b> 	<ul style="list-style-type: none"> <li>Basic expectation of digital / automated options across touchpoints.</li> <li>E.g. online booking &amp; pre-ordering; airport mobile app for updates; automated bag drop &amp; immigration process (facial recognition); digital receipts; QR codes to access info, Live Chat, interactive maps etc. </li> </ul>	Younger passengers/Gen Z (H) Frequent travellers (H) Business travellers (H) PRM (e.g. Help agent on App) Connecting (H) Special Assistance (H)  <i>This has been expanding to be a wider expectation across all segments from Stage 5 onwards.</i>	All parts of the airport journey Check in Bag drop off Immigration Hex Parking services
<b>6. Privacy</b> 	<ul style="list-style-type: none"> <li>A basic need for VIPs.</li> </ul>	VIPs (H) Premium (H)	
	<ul style="list-style-type: none"> <li>Data privacy - developing awareness and knowledge; changing preparedness to share data for specific benefits. Needs and attitudes can vary by cultural background. </li> </ul>	Women (H)	

<b>7. Infrastructure suits my specific accessibility needs</b>	<ul style="list-style-type: none"> <li>Accommodations for range of needs - not just mobility (e.g. quiet rooms, wider security lanes).</li> </ul>	PRM (H) PRS (H)	Check in (H) Security (H) Toilets (H) Departures hall (H) Shops (H) Quiet rooms (H)
	<ul style="list-style-type: none"> <li>Accessibility through all stages of airport journey.</li> </ul>	PRM (H) PRS (H)	All areas
	<ul style="list-style-type: none"> <li>Access to essential amenities from PRS-specific area (e.g. toilets, F&amp;B).</li> </ul>	PRM (H) PRS (H)	PA lounges (E)
<b>8. Air quality</b>	<ul style="list-style-type: none"> <li>Clean air, not 'stuffy', correct temperature.</li> </ul>	<i>No specific groups highlighted</i>	Departure lounge (H) Lounges (H) Coach stations (diesel fumes) (H) Congested areas (H) e.g. Immigration and Security
	<ul style="list-style-type: none"> <li>Some evidence for smokers &amp; connecting passengers mentioning desire for outdoor space.</li> </ul>	Smokers (H) Connecting passengers (H)	
<b>9. Smoking space</b>	<ul style="list-style-type: none"> <li>Smoking room or balcony; not a key driver for satisfaction, but a 'make or break' factor for departing and connecting passengers.</li> </ul>	Smokers (E) Connecting passengers (H) Departing passengers (H)	Tunnels and piers (H)
<b>10. Buggies, wheelchairs, pushchairs available</b>	<ul style="list-style-type: none"> <li>Mobility aids available.</li> </ul>	PRS (H) Elderly (H) Families (H)	
<b>11. Faith and spiritual</b>	Minimal evidence: incidental mentions in current evidence base. Future-scoping pieces raise this as a future trend (related to F&B, prayer rooms etc.).	International passengers (H)	
<b>MY BELONGINGS</b>			
<b>1. Luggage and personal belongings</b>	<ul style="list-style-type: none"> <li>Belongings handled with care (incl. pushchairs, wheelchairs).</li> </ul>	Families (H) PRM (H)	Car parks (H) Departures (H) Arrivals (H)
	<ul style="list-style-type: none"> <li>Understand what is compliant for hand luggage (to avoid belongings being confiscated).</li> </ul>	<i>No specific groups highlighted</i>	

	<ul style="list-style-type: none"> <li>• Able to move luggage through the process (e.g. with ramps, racks, hand luggage trolleys).</li> </ul>	PRM (H) Family groups (H) Travellers with large items of luggage (H) Older (55+)	Surface Access (H) Airside (H)
	<ul style="list-style-type: none"> <li>• Hand luggage secure storage.</li> </ul>	Those in airport for several hours (H)	
	<ul style="list-style-type: none"> <li>• Large luggage loads.</li> </ul>	VIPs (H)	
	<ul style="list-style-type: none"> <li>• Luggage not lost.</li> </ul>	<i>Increasing need - No specific group</i>	
	<ul style="list-style-type: none"> <li>• Luggage can be electronically tracked.</li> </ul>	<i>No specific groups highlighted</i>	
	<ul style="list-style-type: none"> <li>• Lost property assistance.</li> </ul>	<i>No specific groups highlighted</i>	
<b>2. Enable my devices to work</b>	<ul style="list-style-type: none"> <li>• Power sources, means of internet connection (e.g. Wi-Fi, mobile signal).</li> </ul>	Business travellers (H) International passengers (H) Younger passengers (H)	Surface Access (H) Tunnels and piers (H)
<b>3. Money and foreign exchange available</b>	<ul style="list-style-type: none"> <li>• Forex.</li> </ul>	Leisure travellers (H)	
	<ul style="list-style-type: none"> <li>• Cash dispensers.</li> </ul>	Foreign passengers / non-UK residents (H)	Arrivals (H)
	<ul style="list-style-type: none"> <li>• Alternative ways to manage money while travelling (fintech).</li> </ul>	Business travellers (H)	<i>None highlighted</i>
<b>PERSONAL SAFETY AND FEEL SECURE</b>			
<b>1. Safety</b>	<ul style="list-style-type: none"> <li>• Safe environment (e.g. no trip hazards) – including during surface access; environment feels safe (well-lit etc).</li> </ul>	Those travelling late at night (H)	Tunnels (H) Escalators (H)
	<ul style="list-style-type: none"> <li>• Planes are safe: checked, in good condition; surface access transportation is safe.</li> </ul>	Older passengers (H) PRS (H)	
	<ul style="list-style-type: none"> <li>• Safety procedures carried out (routine).</li> </ul>	<i>No specific groups highlighted</i>	
	<ul style="list-style-type: none"> <li>• Safety briefings.</li> </ul>	PRS (H)	
	<ul style="list-style-type: none"> <li>• Safe if become unwell.</li> </ul>	<i>No specific groups highlighted</i>	
<b>2. Secure</b> (Basic need but balance of mitigating security risks sometimes felt)	<ul style="list-style-type: none"> <li>• Protection from terrorists or people doing harm – even drunk &amp; disorderly passengers.</li> </ul>	<i>No specific groups highlighted</i>	
	<ul style="list-style-type: none"> <li>• Security measures carried out (efficiently).</li> </ul>	<i>No specific groups highlighted</i>	

to have tipped too far)	<ul style="list-style-type: none"> <li>Consistent security procedures (airports and countries differ).</li> </ul>	<i>No specific groups highlighted</i>	
	<ul style="list-style-type: none"> <li>Reassurance that automated processes are secure.</li> </ul>	<i>No specific groups highlighted</i>	E-gates (H)
<b>3. Keeping (family) group together</b> (including at airport and during surface access)	<ul style="list-style-type: none"> <li>Infrastructure accommodates families (e.g. family lanes, wider ‘anti-back’ doors).</li> </ul>	Families (E)	Security (H)
	<ul style="list-style-type: none"> <li>Family-friendly provision e.g. separate sleeping areas in disruption; waiting areas with good sight lines to play areas.</li> </ul>	Families (E)	
	<ul style="list-style-type: none"> <li>Lost person’s assistance.</li> </ul>	Families (E)	
	<ul style="list-style-type: none"> <li>Seating with good sightlines to FIDS, play areas, seating (with good sight lines) by meeting points.</li> </ul>	Families (H) (sightlines to play areas)	Departure lounge (H) Arrivals (H)

### Relating the theme to consumer journey and key passenger groups

‘Basic Comforts’, particularly in relation to basic physical and emotional needs, can be different or heightened depending on the passenger type.

- Passenger groups (notably **families and PRS/PRM**) have heightened needs at specific points of the journey/circumstances e.g. knowing in advance what type of assistance or facilities will be available. Toilets, seating and baby changing facilities are important at every journey stage but are sometimes felt to be lacking – especially on piers and tunnels – or too far away from gates (this is key for elderly passengers).
- Connecting and delayed departure passengers** have heightened needs for ‘Basic Comforts’ in light of their extended time at the airport. This includes seating that is conducive to sleep (quiet, comfortable, potentially with blankets). Having a secure place for hand luggage is also a need for those who want to sleep secure in the knowledge their belongings are safe – or for those who want to enjoy the airport facilities unencumbered. Washing facilities are also a ‘Basic Comfort’ for those on or completing long haul flights and wanting to shower before continuing their journey.
- All segments (not just younger/Gen Z passengers, as initially found at Stage 4)**, are now indicating that having automated and digital options are a basic expectation in the ‘New Normal’. While these advancements were appreciated during the pandemic for allowing people to bypass in-person interactions with airport staff, the rise of automation has created led to a desire for seamless, tech-enabled journeys across the age groups. However, this is still comparatively lower for some older passengers.

- Uniquely, **VIPs** (and particularly if famous) require privacy as a Basic Comfort – which is a key motivation for upgrading to VIP lounges.

*'There are no photographers outside. If they find out I'm here it will spoil the whole trip. I have the freedom to get out [of the airport]. I'm not going to be harassed: the comfort, the privacy, it's very personal.'*

**Caroline Thompson PN 2015 Heathrow VIP**

- **Passengers caught up in a lengthy delay** require basic facilities from pillows, toothbrushes, to access to baby formula.
- Various reports testing signage giving live queue updates reveal that **passengers who choose to wait for a queue to shorten** have heightened expectations for 'Basic Comforts' whilst they do this (e.g. comfortable seating, toilet availability, refreshment stands, Wi-Fi, children's play area).

### Evidence tensions

Organising and coding the data for this area presented some challenges for categorising needs when different passengers have different expectations of 'basic'. For example, seating areas that are more than adequate for one passenger, may fail to meet the Basic Comfort needs of another who may need a quieter seating environment or seats comfortable enough for sleeping. Similarly, expectations for a 'basic' food and drink offer will vary by passenger. As a result, to some extent there is a share of data between the 'Enjoyable and Connected experience' need area, depending on the expectations and segment of the passenger.

Automation needs and the degree to which consumers embrace technology has also been a fast-moving area, and there were conflicting analyses of take-up and preference for e.g. self-service bag drop in the early-stage reports. More recent research continues to suggest greater acceptance of automation and self-service, but with a pronounced need for a 'human' back up, with staff readily available to assist, especially during times of disruption and delay. As outlined above, whilst there is widespread desire for automated services, this also raises questions and concerns over the use of personal data. The potential for tensions between this growing expectation for technology with the simultaneous need for support at these stages will be further explored in the last chapter around the need to be 'Cared For'.

### Changing needs to monitor

#### Impact of cost-of-living

It appears that the changing economic situation may influence consumer needs - for example, the most recent wave has shown increasing desire for more affordable options when it comes to shopping, food and drink.

### Elements supporting frictionless travel

'Digital / automated interaction available' references a basic expectation for technology which supports and a growing appetite for seamless travel. There is some evidence of varied openness to these technologies across segments, particularly when it comes to the availability of human support and also how personal data is used. It will also be essential to monitor the desire for automation and tech-enabled journeys and to explore passenger preferences once more of the population has experienced features that are becoming increasingly widespread across airports.

### Increasing expectations for Basic Comforts

As explored above, evidence suggests that expectations around basic needs are increasing, and it is worth highlighting that what is a 'Basic Comfort' today may fall below expectations in future years. Free showers might be an example of this. Showers can be a 'Basic comfort' for connecting or premium passengers in particular circumstances but showers also emerge as a need in the 'Engaged & Connected Experience' bucket. This might be an indication that showers will increasingly become seen as a 'Basic Comfort' for a wider range of passenger groups.

In previous wave, there has been speculative discussion in some of the future-thinking reports that passenger needs will change in line with socio-demographic passenger trends. These might include greater numbers of old and infirm people wanting to travel by air and therefore a bigger focus on e.g. safe and more comfortable environments both on board and in the airport; more support required from ground staff on arrival as well as in the air; the need for healthcare expertise/equipment for more diverse medical situations provided in airports and in planes. Similarly, diversity needs as greater numbers of people travel by air from parts of the world requiring different services. Hence, there are two areas to consider in terms of changing needs which relate to (near) future trends:

- **The needs of an increasingly elderly population** which may have implications for the way 'Basic Comforts' are delivered – such as seating, toilets, healthcare and provision of transportation around the airport.
- **The needs of increasingly diverse passengers** (nationality, ethnicity, religion, language) will have significant consequences, from dietary requirements to religion and prayer times. Additionally, implications for staffing with more multilingual staff needed including both ground staff and cabin crew.

### Evidence gaps

#### Post-COVID expectations of cleanliness

While reports on hygiene peaked during the pandemic, in the 'New Normal' period we have observed a shift away from this focus. As a result, there is currently less clarity around the enduring natures of some of the COVID-prompted actions we saw during the pandemic, such as desire prevalence for hand sanitiser.

### **Cash/Forex**

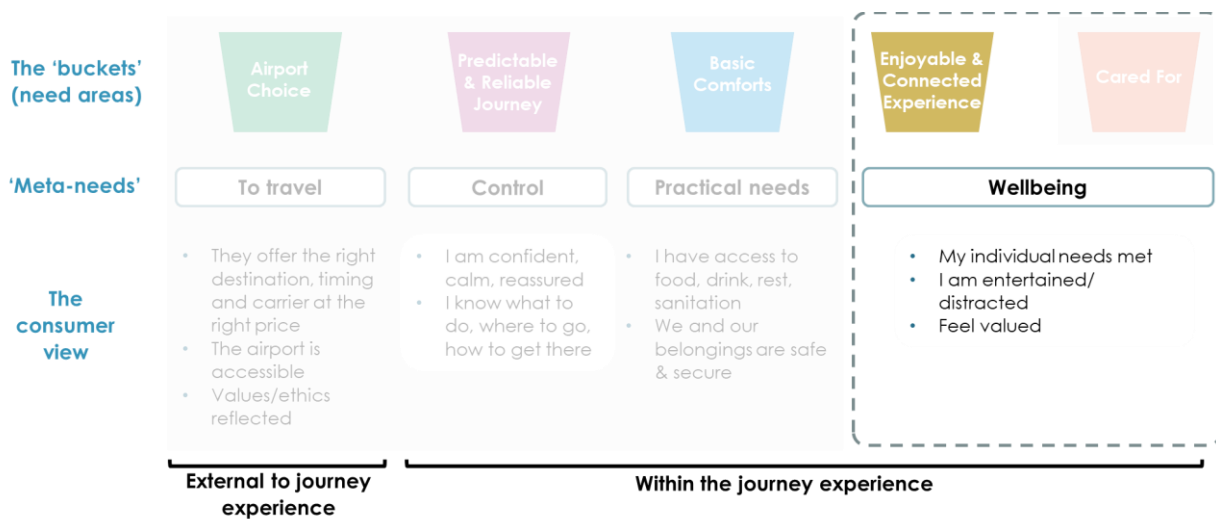
At Stage 6, only one report touched on consumer needs around being able to obtain cash or foreign currency while in the airport. This lack of evidence currently suggests that it may be a diminishing need (especially with the rise of alternative payment forms), but further direct research on this would help better evaluate the present strength of this need.

## 4.4. ENJOYABLE & CONNECTED EXPERIENCE

### Introduction

The ‘Enjoyable & Connected Experience’ ‘bucket’ encapsulates passenger needs focused on getting the most out of the journey/airport experience above and beyond the basic purpose of getting from A to B. To meet these needs an airport must cater for passenger choice and individuality, as well as enabling airport users to stay connected to life outside of the journey bubble. Drawing on what consumers say, this need can be paraphrased as:

*‘I have an enjoyable and connected experience while spending time at the airport.’*



Generally, the themes relating to this area reflect a higher emotional need for a sense of personal wellbeing. The environment of the terminal and the facilities within it can all be geared towards delivery of this need.

The idea of **differentiation** emerged across a number of themes within this need area reflecting the desire for a unique airport experience which allows passengers to enjoy the airport as a destination and create elements within the journey to be relevant to them as an individual. Where needs in this bucket are met or exceeded this can influence future Airport Choice.

### Overview of the themes identified within ‘Enjoyable & Connected Experience’

The themes within this ‘bucket’ fall into three categories and go beyond the more functional needs found in ‘Basic Comforts’ and ‘Predictable & Reliable Journey’ to needs for a more fulfilling experience.

**A. Agreeable surroundings:** an appealing environment in which to spend time.

1. **‘Ambience and aesthetics’**: this relates to the overall feeling and visual appeal of the airport environment, providing an interesting and modern space with attractive décor and artistic features, ultimately making a statement about the values of the airport. The aesthetic, the evidence shows, can deliver a sense of wellbeing by reducing stress and boredom and creating interest. The need for surroundings which help passengers relax and feel calm are amplified in certain situations, for examples during travel disruptions – where a sense of openness, light and airiness is especially valued. Further, a relaxing and calming feeling conferred by the surroundings is important to minimise the impact on passengers of cognitive, psychological and sensory issues. Aesthetic features can also be integral to shaping consumer perceptions of the operation of an airport, as can be seen from passenger quotes about wide walkways and the baggage ‘tubes’ at Schiphol Airport. Passengers also view some terminals as more aesthetically pleasant than others, e.g. comparing Terminal 3 to a ‘prison cell’.

In Stage 6, there is more explicit evidence of the role of the airport environment in supporting passenger wellbeing, with overstimulation from noise, crowding and constant activity negatively impacting some travellers. Passengers highlight specific design elements which help to create a calmer experience, including natural materials, greenery, improved lighting and softer, ambient sound. There is also clearer variation in needs across passenger groups: those with additional needs particularly value quiet, low-stimulation environments; families benefit from more visually engaging features; and premium passengers place greater emphasis on tranquillity and a sense of escape from busy terminal spaces.

Managing noise levels within PA waiting areas is perceived to be a priority and can help to reduce stress and anxiety... This is particularly important for those who are negatively impacted by loud noise e.g. if they are neurodivergent and/or have health conditions like epilepsy.

**Waiting Areas Evaluation Research - Debrief - FINAL.pptx**

Passengers discuss the importance of a use of space that creates a sense of calm in a stressful environment, and how Heathrow can manifest this in innovative ways by taking inspiration from other airports – through greenery, yoga rooms, water features, and outdoor courtyards, for example.

**Innovations at Heathrow Report v1.0**

*‘Chicago O’Hare is a great example, where you walk a lot, but the technology used through the walkways makes it interesting and therefore less concerning.’*

**Horizon QSM Check Report v1.0.pptx**

‘Creating a sense of real or illusionary space in the airport terminal is calming and a key way in which to drive satisfaction across ambience metrics and increase cooperation/ compliance at security.’

**Customer Needs in Security**

Passengers also recognise the mental benefits of a curved shape. Curved, open spaces feel much more welcoming and calming than closed, narrow areas.

**Walk Through Duty Free Understanding Report v1.0**

[There is an appetite for special spaces at the airport] to enhance the functional experience and capture the excitement of travel. This can be as much around the décor as well as activities - creating the right ambience and personality. It would make people feel more welcomed and rewarded... current space can feel too designed around retail opportunities rather than Heathrow caring and valuing passengers.

**Heathrow Experiential Concept Research - 25 July 2018.pdf**

Some of the evidence reports point to areas of weakness in respect of ambience: space post-security to regroup is lacking and instead passengers feel herded into the Duty-Free shopping environment. Airports generally can feel sterile, and piers and tunnels specifically have poor ambience. There is an opportunity to deliver enhanced terminal ambience in these areas.

Frequent flyers complain about blandness and uniformity of airports. Décor, design, art works/exhibitions add interest and are appreciated.

**AW169 Heathrow Connections Research**

*‘I just think this tunnel reminds me of a public toilet which is not what you expect to see at Heathrow.’*

**10832312 Walking Distances Research Summary - Jan2012\_pptx\_aspx**

*‘If it’s too noisy, I can’t hear or think. I just get sensory overload I’ll need to find a quiet place.’*

**PRS Barriers Research - Research findings debrief - December 2024**

On the needs of departing 'Passengers Requiring Support', Passenger would like to see an area somewhere after security where it is away from the main departure lounge area and is sedate and noise free.

**Passenger Segments Review 2023.pptx**

The things passengers want (that are currently unfilled in some experiences) are large windows offering natural view, views of the runway (keeping the space open and light), separate areas with sample seating (e.g. bar vs eating vs working), chef made/fresh food. Customers don't like when seats aren't comfortable (e.g. bar stools) or lack privacy, not configured the right way, or don't have somewhere quiet to go if travelling solo/quiet (e.g. having to be near loud parties).

**Horizon - Airport Lounges Report v1.pptx**

*'Going through security is often stressful, and always very busy. The additional noise caused by the trays does not add to the general ambience!'*

**Human8 x Horizon\_Heathrow Security Trays\_Report v1.0**

The combination of crowded spaces, frequent loudspeaker announcements, and an atmosphere of almost constant activity can create overstimulation, which negatively affects the overall wellbeing of some travellers.

**2026-ACI-ASQ-Global-Traveller-Survey-Report**

Nature is repeatedly mentioned as a positive and calming influence... making the space feel warmer, more welcoming, and less sterile.

**Terminal Dressing T3 Pier 6 - Epinion - Report.pptx**

**B. Entertainment:** providing the means for consumers to pamper, amuse, distract and treat themselves while in the airport. There are three aspects to this theme:

1. **'Amenities that are relevant to me':** consumers are looking for a range of amenities to suit their personal taste and/or pocket, from eating or drinking environments that are familiar (and perhaps a lower cost option) to dining experiences that are premium and special. Similarly, some consumers are looking for familiar high street shops whilst others seek niche or iconic brands. Evidence suggests there is a continued tension between affordability and premiumisation. Many passengers are looking for a good range of affordable, familiar options, particularly for everyday food, drink and functional, travel-related items. At the same time, there remains a clear appetite among others for more premium, higher-end and more distinctive retail and dining experiences. This reflects a broader pattern whereby some prioritise value and convenience, while others are more willing to spend to enhance their time in the airport (see Enhanced personal comforts below). Family-friendly amenities are also a focus, for example dining options that cater to families.

*'Heathrow is not really for me, it's full of business people heading to luxury locations. The shops and the restaurants seem rather expensive [...]' At Gatwick*

*there are lots of people like me, I feel relaxed here and I can choose from all of my favourite shops and food places'*

**Heathrow Under 25s Research Debrief**

*'It depends what people want. We don't want designer stuff. For me if you've got a WHSmith, a Boots and some normal high street shops – that's me. There's a shoe shop: I don't want to buy a pair of shoes in an airport. But then there might be someone who does want shoes.'*

**T3 Seating & Crowding Final Presentation**

*"Drink and food would be cool, for example the strawberry dish that they serve at Wimbledon could be featured. Or there could be some info on how to attend Wimbledon as a tourist..."*

**Sports experiential research report v1.0**

A low-cost carrier terminal in the future would likely have less high-end retail spaces, and more 'on the go' food and beverage options to support passenger needs, but the service/space/lighting/navigation should be of equal standard to other terminals.

**Low Cost Carriers Report v1.0**

*'In the future I think we need to focus on providing a more interactive and personalised experience, where passengers can create wish lists on an app or online and then purchase these items quickly and efficiently during their visit.'*

**Horizon Retail Report July 2018**

Loyalty can be earned through hyper-personalisation and a focus on customer time...People want experiences that are actually relevant for them.

**Heathrow Rewards Report - July 2018**

In 2023, the global duty-free market experienced robust growth of 27.7%, driven by a surge in demand for luxury goods. Duty-free outlets position premium and luxury goods as accessible for international travellers because of their tax-free status. Middle-class travellers perceive luxury goods at duty-free stores to be good value for money and a chance to obtain luxury items that they assume to be beyond their reach otherwise. The inclusion of high-end brands in duty-free stores not only elevates the shopping experience but also stimulates impulse buying, driving store sales in the near term, growth is anticipated to decelerate to 15.5% in 2024, attributed to a decrease in demand for non-essential items

amid inflationary pressures and economic uncertainties stemming from macroeconomic challenges. (Blue Marble commentary on data)

**GlobalData\_GlobalDutyFreeRetailing20182028\_180624.pdf**

Passengers are spending less on discretionary purchases. They're asking for more affordable/cheaper shopping/dining options. They want: greater variety of more affordable shops, there are too many high-end shops.

**Segment profiles (approx financials).pptx**

On the reduced demand from shoppers for luxury goods, 'high levels of inflation and economic uncertainty seen across the globe have reduced the purchasing power of shoppers and made them wary of making big-ticket purchases. This is taking a toll on the consumption of luxury goods at airport retail outlets.'

**GlobalData\_GlobalAirportRetailing20182028\_260324.pdf**

On the shops at Heathrow, *'[I browse] Just to pass the time really, I don't buy anything because the shops they have at Heathrow are ridiculously expensive.'*

**Horizon- Travel Intentions 2023.pptx**

Value for money is not just about the price of the food – there needs to be a variety of high quality, tasty options available! Ensure that there is a choice across all open outlets at all times so passengers can find the type of food or drink that meets their needs. Unfamiliar brands have the benefit of being unable to be price matched vs the high-street but do still need to communicate the quality of their offer in order to compete against known brands whose offering passengers are already familiar with.

**Horizon x Human8 - VFM in FB - April 2024 v3.1**

Premium passengers want to 'discover curated, high-quality items or meaningful deals that feel personal and special, not just routine airport shopping'.

**10409 - Heathrow Premium Customers - Report VF\_C**

Elements important to family flyers when choosing an airport - Comfort and Facilities: There is a significant emphasis on comfort, which includes having enough seating, clean restrooms, and dining options that cater to families. Wi-Fi availability and family-friendly lounges also enhance the travel experience.

**W3 2025 Heathrow\_Brand Deep Dive Presentation\_v3\_ClientUseOnly09.02.26**

2. **‘Things to do’:** The need for having various options for ‘things to do’ to make good use of time is relevant for most passengers during their journey, both within and outside the airport. This need can be heightened in certain circumstances – such as when passengers suffer flight delays or disruption and have additional time to spend in the airport. The evidence includes many examples of things consumers choose to enhance their airport experience including shopping (or window shopping), eating and drinking, films, exhibitions, live entertainment, immersive experiences, children’s play areas (catering across the age range), health and beauty (pampering) services and at-seat tablets for personal watching/gaming/reading etc.

*‘We just spotted the toys so I will let the children play here until they get fed up. It keeps the children occupied. They find it hard to sit and wait. If they have something to do while we wait it helps the time go quicker. We’ll just let them get tired a bit and by the time we are ready to depart they will be ready for a nap.’*

**T2 Seating & Crowding Final Presentation**

*‘There are just so many restaurants and shops in Heathrow you could do endless shopping in there which is great, especially when you have ages to wait. I suppose you will never get bored which is always what I worry about in the airport.’*

**Heathrow Under 25s Research Debrief**

*‘Our terminal is awesome. It’s like we’re in a high-end shopping mall. Tons of nice shops and places to grab a bite. This is a cut above Toronto.’*

**190822 – DNA Phase Two – THS Final**

*‘I’ve had a facial, a massage and a sauna and now I’m eating Haagen Dazs – pretty perfect?!’*

**AW169 Heathrow Connections Research**

*‘I often have a really rushed two weeks preparing for the holiday – if I knew I could take care of my nails at the airport, it would be one thing off my mind.’*

**T5 Cut Through Final Presentation – September 2017**

Interactive distractions, either in the IDL, or at points at which passengers are likely to have to wait around / queue, tap into an increasing consumer need to ‘share’ experiences.

**Distraction at the airport report v1.0**

Passengers that have experienced a severe disruption or delay have highlighted other airports around the world (e.g. Singapore) for providing a variety of free activities and things to do for all ages and audiences.

**Heathrow resilience debrief\_Updated\_ 14.02**

When it comes to what visitors do in a lounge, 71% say it's to rest and relax before a flight (the top reason). This is followed by browse shops (52%), buy from shops (52%), work (45%) and use spa/shower 41%. Food and drink come lower at 26% and 27%. (Blue Marble commentary on data)

**Horizon - Airport Lounges Report v1.pptx**

In the event of minor delays or disruption, to avoid it becoming severe, passengers want to see [a] variety of activities, [a] greater number of options to entertain themselves.

**2022 Customer Satisfaction and Engagement Review.pdf**

*'We often fly long haul with children and at [the] airport they can get bored and impatient. Always helpful to have play area to distract them and also burn off steam before flight.'*

**Horizon- Play Area Observation Deck Report.pdf**

*'I'd love for Heathrow to surprise me make me feel like I'm not just passing through. Turn the airport into a place I want to spend time in, not just have to.'*

**Horizon Travel Personas V1.0**

Overall impact on customer experience is very positive, with programme of live music, entertainers & roaming carts praised by a broad range of passengers as a unique, special, memorable offering on part of Heathrow. *"It's great. It's hard travelling with kids and spending 3 hours at the airport. Anything that distracts them for even 5 mins is great!"*

**Heathrow Summer Sounds 2025\_Research Findings\_31.07.25.pptx**

While all generations perceive airport entertainment options as differentiated, more than half of Millennial (52%) and Gen Z (51%) travellers report planning their connecting flight itineraries to take advantage of these offerings, which is far greater than the proportion observed for Gen X (36%) and Baby Boomers (10%). Younger generations also show the highest receptivity levels to Sense of Place initiatives.

**2026-ACI-ASQ-Global-Traveller-Survey-Report**

3. **‘Enhanced personal comforts’**: This can include a diverse range of seating to meet the need to sleep or socialise or look at the view. Sleeping facilities including beds, sleep pods and blankets, as well as showers (particularly for delayed or connecting passengers). For some passenger groups, including non-UK passengers and business/premium passengers ‘enhanced comforts’ can include additional ‘world class’ facilities such as fitness rooms and even private bedrooms, along with an expectation of high quality lounge facilities.

In Stage 6, there is continued evidence of strong demand for premium services and lounge access, with willingness to pay remaining high. Demand continues to be led by premium and business passengers, though expectations around value and experience are increasing as airports become more crowded. Families are increasingly engaging with lounge spaces and seeking more inclusive, family-friendly environments, highlighting the need for more flexible premium experiences. There is also evidence of increased demand from younger consumers. Perhaps linked to this broader usage, there is also a growing focus on privacy, with demand for quieter, more spacious and clearly zoned environments.

*‘In Toronto, there are a lot of seats around the departure gates...they have iPads in every seating area, you can relax and entertain yourself whilst you’re waiting.’*

Premium Non-EU

**WP01 What matters to Passengers – Qualitative Research Findings Nov 2017**

*‘The best benefits are those that enhance your time at the airport. For example, access to lounges, showers, fast track security etc.’*

**Heathrow Rewards Report - July 2018**

*‘Keep me fit: sometimes I am in the airport for some time, fitness room & showers.’*

**Horizon - Expansion pop-up - Full Interim Report**

*‘My favourite part of being a business class passenger isn’t even the flight...it’s the lounge beforehand. I arrive early just to spend time there. I don’t want to turn up to Heathrow in the future and find it bursting at the seams.’*

**Heathrow resilience debrief\_Updated\_ 14.02**

*‘I think that less commercial activity and more ways to relax would make the journey more comfortable.’*

**Horizon - Small Retail Opportunities.pptx**

For those who usually spend money on ‘priority services’, 50% are willing to spend more [...] For those who usually spend money on ‘paid lounge access’, 44% are willing to spend more. (Blue Marble commentary on data)

### Heathrow Brand Tracker\_Topline\_Nov 23.pptx

On their need to use the lounge, *'I'm flying business class, so why wouldn't I? It's a more civilised place for breakfast, sitting around, reading, etc than the open concourse.'*

### Horizon- Travel Intentions 2023.pptx

[In relation to crowding] travelers are also open to paying for premium services which would help to improve their experience. Priority check in (23%) and lounges (23%) were the most popular.

### AX25\_Airport\_Experience\_Research

Enhancing Airport Lounges: As the demand for premium experiences continues to grow, lounges offer a valuable setting to meet this need. Travellers who had recently visited lounges reported significantly better perceptions, especially regarding value for money—a common pain point in airports. Expanding lounge access or incorporating elements of the lounge experience into the broader passenger journey could deliver substantial value, especially considering the high level of interest travellers reported for spending time in areas dedicated to a specific purpose (e.g., family zone, work area, gaming zone, socializing, etc.).

### 2026-ACI-ASQ-Global-Traveller-Survey-Report

Lounges must be welcoming for every traveller - including families. Families value the lounge's tranquillity with children, yet often feel unwelcome or judged by other travellers, making the experience less comfortable despite its appeal as a peaceful space

### 10409 - Heathrow Premium Customers - Report VF\_C

An inter-generational wealth shift will mean that more of this younger group will start to tap into premium travel experiences. Epinion interviewers (our airport customer interviewers) have already noted a rise in 'tik tokers', that are seeking adventure and upgrading experiences as a part of that.

### Premium Insights - What we know Update 25 09 FINAL

- C. Connected to life outside the airport:** this theme is about remaining connected to 'real life', be that work, friends, family or to the wider world. The need to feel connected cannot be met simply by internet connectivity but is about the environment facilitating activities e.g. quiet, comfortable space with a desk for working; privacy for personal or professional conversations; access to the global media. It is also about giving consumers a sense of place and time (clocks to

show time zone) by rooting the passenger at Heathrow and enabling passengers (who might only be connecting and not leaving the airport) to get a feel for the UK as a destination. While foreign visitors may appreciate elements that reflect the location, such as the Union Jack, these symbols can carry negative connotations for some British passengers - for instance, associations with far-right groups.

The 'strangeness' of a new place can be harnessed and optimised by celebrating the environment and tinging the experience with novelty, knowing they have arrived and are experiencing British culture is important.

**170531 Heathrow DNA Programme Integrated debrief FINAL**

80% are in favour of introducing multi-lingual messages on board the Heathrow Express. Passengers can select their country flag and hear safety and marketing messaged in their own language

**Horizon Report - HEx Improvement Propositions July 2021.pptx**

*'I don't often spend much time landside but would benefit from a last-minute gift/snack/water/drinks stand or something uniquely London to make me want to stop'.*

**Horizon - Small Retail Opportunities.pptx**

Non UK passengers like the idea of receiving a British welcome, and referred to advertising of British landmarks and attractions on the walk to border control.

**Horizon QSM Review Report 2021 v1.0**

For business [travellers] and those who want to entertain themselves online it is all about heads down and disengaging themselves from everyone else.

**Heathrow Experiential Concept Research - 25 July 2018.pdf**

*'Social media opportunities as well...once you're through...you're checking in and saying where you are flying to on social media anyway. You could have personalised opportunities to engage with social media – at festivals and things you have props to do that, and then share it with friends and families.'*

UK Leisure

**WP01 What matters to Passengers – Qualitative Research Findings Nov 2017**

*'The background of Lord's was so realistic I think my friends would believe me if I told them I was actually at the ground', 'My favourite part has to be having my name on the score board at Wimbledon'; 'I absolutely love a photo booth and I*

*thought that's what this would be like – fun photos and some printouts as a souvenir.'*

**Heathrow Experiential Measurement - 'Summer of Sport' Findings - Final with follow ups**

*'I am quite surprised there aren't any TVs: wherever you are it's nice to catch up on the news.'*

**AW169 Heathrow Connections Research**

Passengers have suggested having televisions inside the coach stations showing BBC News or other channels.

**Coach and Airports Research Debrief June 2018.pdf**

Many are interested in a British themed toy, or toy unique to UK culture (even higher among non-UK customers, 18-34, families and business as the top 4).

**Toys Strategy- Apr 2023.pptx**

*'Probably the best bit for me was just getting to chill out in the lounge. I really, really value my time there - I can't express enough how much I like it. It's a chance to catch up on things where I have absolutely no distractions. I sat and caught up on personal emails and had a light bite to eat. I have noticed recently the lounges have become really, really busy and that does spoil my enjoyment of them. A lot of the time people will also be making video calls on speaker or having Zoom meetings over loudspeaker which I just think is really rude and inconsiderate!'*

**Heathrow x Human8 - Universal Needs Passenger Strategy topline v1.0.pptx**

UK passengers are significantly more likely to feel Union Jacks have a negative impact than non-UK passengers (25% vs 7%) with some citing the associations with far-right groups. Non-UK passengers are significantly more likely to feel that these do have a positive impact (46% vs 22%).

**Human8 x Horizon\_Heathrow Security Trays\_Report v1.0**

*'I'm heading home from my first visit to the UK... best trip of my life. I would normally have my Beats [headphone] on listening to my own music but having this guy play – Wow! I've got goosebumps - I've never seen anything like this at an airport. It's SO British, I love it, I'm sitting here chilling, looking at photos [of my trip] – what a cool way to end things...'*

**Heathrow Summer Sounds 2025\_Research Findings\_31.07.25.pptx**

The most critical and most common need people have for Wi-Fi when they arrive at Heathrow, is to call and message friends and family to let them now that they've landed safely.' "It's important because we don't live here, and we need to communicate immediately with our family to say, 'we're fine'.

**Report - T5 Wi-Fi Research.pdf**

Some passengers appreciate when airports reflect the local culture. Suggestions include adding references to British landmarks, architecture, or symbols like the Royal Family to make the designs feel more contextually rooted in the UK.

**Terminal Dressing T3 Pier 6 - Epinion - Report.pptx**

The reports evidencing each theme are listed below, along with an evidence score for each theme.

'Enjoyable & Connected Experience' Themes:	No. reports with supporting evidence	Evidence score
<b>Agreeable surroundings</b>		
• Ambience and aesthetics	104	571
<b>Enjoyment and Entertainment</b>		
• Amenities that are relevant to me	106	568
• Things to do	97	517
• Enhanced personal comforts	85	463
<b>Connected to life outside the airport</b>		
• To the wider world, work and personal life	80	431

\*The evidence score assigns a value to each report based on the 'quality score\*\*' for that report. The values for all the reports contributing to each theme are then added together to provide the evidence score.

\*\*The quality score is based on the rating of robustness and relevance for the report content - detailed in Appendix Methodology (section 2).

▲ Indicates higher rank position since stages 1-5

## Quality of the evidence

ENJOYABLE & CONNECTED EXPERIENCE Referenced in 206 out of a total of 503 reports	
<i>Detailed analysis conducted using 181 key reports</i>	
6	101
5	80
4	21
3	2
2	2

The themes within ‘Enjoyable & Connected Experience’ appear in 206 of all the reports reviewed, making it the least referenced need area among the 5 meta needs – though still highly reported on. Among these, 181 of the highest quality reports form the basis for the detailed thematic analysis.

Several reports focus specifically on ambience, entertainment facilities and lounges at Heathrow, which informed the detailed breakdown of the meta

need area. There are also multiple reports that focus on innovation and new concept development that have informed the analysis and support the theme of differentiated experiences for passengers. The additional evidence for this wave in particular also indicates an increase in passengers seeking enjoyment and special treatment while at the airport; a trending area to monitor in the future.

The evidence base also demonstrates that needs and expectations within this area can vary by culture, primarily exploring British, American and Chinese cultural differences; there may be scope to extend this understanding, while also anticipating that specific needs in this area are likely to develop over time.

## Themes within this need area


The themes uncovered in the reports are explored and evidenced in more detail below



### Key:


**(H) identifies a passenger type or journey stage with heightened relevance to this theme / need**

**(E) identifies a passenger type or journey stage that is exclusively relevant to this theme or need (the theme / need ONLY applies to them)**

Theme	Needs & expectations within the theme	Key passenger groups	Key journey stage
<b>AGREEABLE SURROUNDINGS</b>			
<b>1. Ambience and aesthetics</b>	<ul style="list-style-type: none"> <li>Appealing airport interior design (e.g. modern, interesting, sense of space and light, fresh, clean lines, new, open, high ceilings, large</li> </ul>	VIP (H) Frequent flyers (H)	Departures (H) Arrivals (H) Piers / tunnels need improvement (H)

	windows, comfortable temperature).		
	<ul style="list-style-type: none"> <li>Sense of openness and airiness.</li> </ul>	<i>No specific groups highlighted</i>	
	<ul style="list-style-type: none"> <li>Relaxing space and ambience to minimise stress.</li> </ul>	PRs (with unseen personal circumstances) (H) Disrupted travellers (H) Premium (H)	Departures (H) Stressful stages such as Security (H)
	<ul style="list-style-type: none"> <li>Attractive presentation and decor (e.g. music, art, water features, exhibitions, colour, plants and greenery, soft lighting).</li> </ul>	VIP (H) Frequent flyers (H)	Departures (H)
	<ul style="list-style-type: none"> <li>Differentiation (e.g. stimulating, sense of energy and warmth in environment) - not generic airport, not dull or boring, not sterile nor clinical.</li> </ul>	VIP (H) Frequent flyers (H) Families (H)	Departures (H)
	<ul style="list-style-type: none"> <li>Interactive space: welcoming, modern, innovative.</li> </ul>	<i>No specific groups highlighted</i>	Departures (H) Arrivals (H)
<b>ENJOYMENT &amp; ENTERTAINMENT</b>			
<b>1. Amenities that are relevant to me</b>	<ul style="list-style-type: none"> <li>Types of eating and drinking establishments (e.g. from familiar brands, casual eateries, fast food to full sit-down meals, gourmet cuisine, Michelin star etc. and from chain pubs and bars to champagne bars).</li> </ul> 	All Families (H)	Departure lounge (E)
	<ul style="list-style-type: none"> <li>Types of shops (e.g. from mainstream, high street shops to high-end, designer and niche interest shops).</li> </ul>	All	Departure lounge (E)
<b>2. Things to do</b>	<ul style="list-style-type: none"> <li>Audio/visual entertainment (e.g. TVs, iPads, cinema, library, movies, exhibitions, artwork, music, live entertainment, newspapers, books, games).</li> </ul>	All	Departure lounge (E)
	<ul style="list-style-type: none"> <li>Differentiated entertainment to justify expense of lounge (e.g. international papers, Sky Sports,</li> </ul>	Premium lounge users (E)	Premium lounges (Departures, Connections, Arrivals) (E)

	Sky News, on-demand films and music, iPads/latest tech).		
	<ul style="list-style-type: none"> <li>Kids facilities (e.g. ball pit, play areas with space for kids to sleep, crèche, trampoline, football kickabout zone, basketball hoop, bowling, Laser Quest, soft play, colouring sets).</li> </ul>	Families (especially delayed) (E)	Departures lounge (E)
	<ul style="list-style-type: none"> <li>Many – including experiential - shopping and eating opportunities (e.g. shops, pubs, cocktail bars, restaurants, cafes etc.).</li> </ul>	All Disrupted passengers (H)	Departures lounge (E)
	<ul style="list-style-type: none"> <li>Health and beauty services (e.g. gym, pool, spa, nail bar, hair salon, massage, yoga, sauna room).</li> </ul>	VIP/Premium passengers (H) Business (H)	Departures lounge (E)
<b>3. Enhanced personal comforts</b>	<ul style="list-style-type: none"> <li>Diverse range of seating (e.g. sofas, armchairs, reclining chairs).</li> </ul>	Delayed (H) Connecting (H)	Departure lounge (E)
	<ul style="list-style-type: none"> <li>Sleeping facilities (e.g. beds, sleep pods, blankets).</li> </ul>	Delayed (H) Connecting (H) Non-UK (H)	Departure lounge (E)
	<ul style="list-style-type: none"> <li>Showers.</li> </ul>	Delayed (H) Connecting (H)	Departure lounge (H) Arrivals (H)
	<ul style="list-style-type: none"> <li>Availability of premium lounges. </li> </ul>	VIP/Premium passengers (H) Business (H) Non-UK (H) Families (H) Younger (H)	Premium lounges (Departures, Connections, Arrivals) (E)
<b>CONNECTED TO LIFE OUTSIDE THE AIRPORT</b>			
<b>1. To the wider world, work and personal life</b>	<ul style="list-style-type: none"> <li>Connected to time zone – clocks. </li> </ul>	Connecting (H) Arrivals (H) Nationality differences	Departure lounge (H) Connecting (H)
	<ul style="list-style-type: none"> <li>Connected to where I am - British identity in airport (e.g. British craftsmanship and style, British service, artwork, exhibitions, displays, themes from British heritage and culture, in food / beverage / shopping provision).</li> </ul>	All	Departure lounge (H) Connecting (H) Arrivals (H)
	<ul style="list-style-type: none"> <li>Connected to my work - facilities and environment to enable working.</li> </ul>	Business (E)	Departure lounge (H)
	<ul style="list-style-type: none"> <li>Connected to my personal / social life - Social media opportunities</li> </ul>	Leisure (H) Foreign (H)	Departure lounge (H) Arrivals (H)

	(e.g. Heathrow-related props for pictures posted on social media; Ability to connect constantly via social media – or in specific circumstances e.g. payphones/ ambassador-provided mobile calls to relatives during disruption).		
	<ul style="list-style-type: none"> <li>• Connected to the wider world - Access to news e.g. by TV, newspapers, ambassador-provided tablets.</li> </ul>	All	Departure lounge (H)

Relating the theme to consumer journey and key passenger groups

- Having paid for an enhanced experience, **VIPs and Premium passengers** tend to have higher expectations for themes within this need area, for example expecting high quality lounges as a given, plus greater expectations for entertainment within these too.
- **Frequent Flyers** who are familiar with multiple different airports also tend to be more focused on seeking elements of differentiation for the airport.
- **PRM/PRS individuals** are particularly seeking to have appropriate options for them, including having calm environments that are not too over-stimulating.
- **Younger passengers** may be more attracted to innovation in shopping and eating opportunities, plus some indication that Gen Z seek experiences that resonate with their personality. There is also evidence of growing lounge demand from younger consumers.
- **Business travellers** need to be able to work and connect to their commitments at the airport.
- **Leisure and foreign travellers** have heightened needs around connecting to their personal life outside of the airport.
- **Families** have a heightened need for entertainment/distractions, especially when flights are delayed for families travelling with children. Young families have distinct needs when it comes to their young children, such as specific children’s facilities like play areas, changing rooms etc. Families are increasingly engaging with lounge spaces and seeking more inclusive, family-friendly premium environments.
- **Connecting passengers** place greater emphasis the ‘connected’ element of their journey, such as the importance of clocks to orientate themselves while in their connecting airport, as well as the ability to culturally situate themselves by observing a clear British identity.
- Evidence for this need area most often focuses on the Departures experience, being the journey stage where passengers have time to fill after completing check-in and security.

## Evidence tensions

The main tension in this area lies between the differing needs of passengers who are excited to be at the airport and want a large amount and variety of entertainment facilities (e.g. an infrequent leisure traveller) versus those who want as little engagement as possible with the airport (e.g. a frequent Business traveller). Previous stages demonstrated that, in terms of delivering against this need area, the emphasis is on enabling the consumer to make choices that are appropriate for them. Some evidence in the third stage of the synthesis investigated a possible solution to this tension: the idea of 'flexible use of space' to best accommodate a wide range of consumer needs in finite physical space.

The rising cost-of-living has seemingly led to an increase in evidence of consumers wanting airports to better cater for all budgets (including affordable options for food and drink). This appears to be in tension with increased demand for enjoyment and special treatment while at the airport, and an appetite for premium services. The overarching need, however, is for passengers to have choices that are right for them, as shown by the increase in evidence score ranking for 'Amenities that are relevant to me'.

## Changing needs to monitor

### **Demand for enhanced personal comforts**

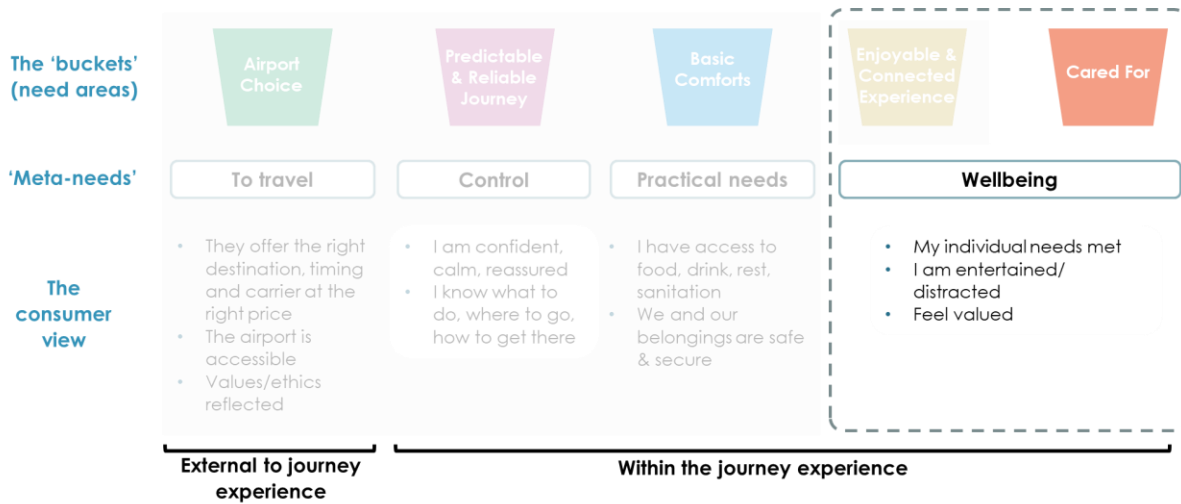
As above, the recent evidence continues to point to a growing appetite for greater enjoyment at the airport, beyond the basics that passengers need to complete their journey reliably and comfortably. In particular, busier airports appear to be driving an increased appetite amongst a broader audience for premium elements such as lounges and it will be important to monitor how the needs of different segments vary within this context. In addition, given the impact of the changing economic climate on people's choices, it will be worthwhile monitoring how desires for enhanced personal comforts evolve over time.

## 4.5. CARED FOR

### Introduction

‘Cared For’ reflects higher order passenger needs (beyond ‘basic needs’) that are centred around feeling looked after, valued and supported across the full spectrum of eventualities – including unexpected and adverse circumstances. The feeling of being looked after is something that can be memorable for passengers, bringing actively positive impressions of an airport, and potentially feeding into airport preference and choice. From a consumer point of view, this need area can be paraphrased as:

*‘I feel cared for because I’m valued and supported in all eventualities’*



The type of needs (or themes) reflected in this ‘bucket’ are a mix of both emotional and practical. The needs are often – but not exclusively – related to interactions that passengers have with staff in their airport journey (spanning a broad definition including airport staff, airline staff, and even employees of third-party companies operating in the airport and beyond).

Within ‘Cared For’ the themes range from more fundamental, commonly shared needs (like availability of necessary assistance where required) through to ‘delight’ factors that can result in a memorable experience with a positive emotional halo effect (such as spontaneous acts of generosity).

‘Cared For’ needs are relevant across all stages of the airport journey (including surface access) and can vary depending on the passenger type (for example PRS and VIPs). ‘Cared For’ needs are accentuated in unexpected or crisis situations where additional stress is experienced.

### Overview of the themes identified within ‘Cared For’

The themes identified within ‘Cared For’ are listed below and fall into three categories:

**A. Active assistance:** this encompasses several elements:

1. **‘Always visible and available’:** this means having assistance when you need it. This often hinges on the presence of staff in the right place at the right time, night or day, and can also include knowing what assistance is available before arriving at the airport – a particular need for passengers with special requirements. Visibility of staff is important, either by their uniform or stationed at help desks. Availability of assistance can also encompass assistance through other channels, such as apps or touchscreen help points, which may be particularly relevant for certain passenger groups such as international passengers who prefer to self-serve or do not speak English, and consumers with certain cognitive, sensory or psychological conditions who prefer not to interact with staff. This need is heightened at certain points of the journey – arrivals, connections and immigration – and especially for non-English-speaking passengers. PRS and PRM passengers have a heightened need to know where to go for support and for assistance to be consistently available at each step of their journey.

In Stage 6, there is continued evidence that visible, proactive and well-timed staff support remains critical, particularly as journeys become more digital and complex. As in the previous stage, passengers value technology for efficiency, but still rely on human interaction for reassurance, guidance and problem-solving. This is particularly important for vulnerable passengers (e.g. PRS/PRM), older travellers, and those under time pressure, who may struggle with self-service processes or unclear information.

*‘There could also be one or two more people on duty to show us which line to join. Someone pointed "down there" but was not clear which security station to turn into.’*

**Horizon\_Passenger Expectations Post COVID-19 Ethno v1.0.pptx**

Just a fraction of passengers are actually seeing or utilising the customer assistance teams at Heathrow – 52 percent of Easter passengers did not see the ‘Here to Help’ team during their visit to Heathrow. The majority of passengers have not heard of passenger ambassadors or here to help team, and those who have are highly unlikely to be using them.

**Heathrow Horizon Travel Disruption - final report v2 May 2022.pptx**

Ability to provide clear, timely information is one of the most important things determining satisfaction with staff. *‘Helpfulness, politeness, ability to speak slowly to non-native English-speaking passengers...’*

**Horizon QSM Check Report v1.0**

[Immigration] This is the most overwhelming part of arrivals, so ensure that Heathrow have plenty of staff on hand to ease the stress and offset any negative experiences with border control staff.

**Horizon Arrivals report v1.0.pptx**

[Cited as the 4th most desired improvement for Connecting passengers] Airport staff available to meet you off the plane if you have limited time to connect.

**10641312 Heathrow Airport Customer Valuation Research\_Final Report\_v0.5**

Lack of assistance when disembarking at arrivals gates has more serious consequences for connecting customers on tight turnarounds. Some miss flights as PA is not there to help, or have unnecessarily stressful transitions with no staff to ask where to go.

**Heathrow Passenger Assistance Service Journey Assessment Debrief  
270323.pptx**

On the needs of 'UK Business' departing passengers: Self service machines not working, [passenger] tried lots [of machines] and other people were finding the same. Not enough staff around to help.

On the needs of 'Premium' arriving passengers, 'Passenger is a seasoned traveller but remarked that not everyone is. [They] suggested that E-gate would be difficult to use as a first time passenger. Need sufficient staff to help.'

**Passenger Segments Review 2023.pptx**

'Meeting... passengers' expectations... will require humans operating optimally alongside technology.'

**ACI-White-Paper\_Evolution-of-the-Airport-Workforce-FINAL.pdf**

On providing reassurance, 'Even with signage available, passengers [are] keen to talk to someone to further reassure them, or double check they can take the respective mode of transport to [their] final destination.' ... *"It would be great to have someone to speak to when I'm trying to work out where to go - nothing beats chatting to a human being."*

**Final Heathrow Lift Evaluation Report - 07.08.23.pptx**

More consumers prefer a self-service system when buying an aeroplane ticket, collecting their bags or even checking in. However, more consumers prefer to speak to a person when boarding or exiting the aeroplane, [or] going through security.

**BA-2119-Flight-of-the-Future-report.pdf**

Staff were at passport control and flight connections security to guide and assist passengers. This made travellers feel confident they were on the right path and assured them that help was available, reducing any potential anxiety or hesitation.

**Tobii - Heathrow Wayfinding Report T2\_CLIENT**

*'Be visible. Sometimes I see staff huddling in groups and it's not clear who to approach... even a sign saying 'Ask me a question' would help.'*

**Customer Service week customer cards v0.1.pptx**

Travellers want technology for efficiency but also human connection for confidence and care.

**2026-ACI-ASQ-Global-Traveller-Survey-Report**

*'There was no assistance to help tell us where to go and no-one to push a wheelchair. If we'd have both been wheelchair users, we would have been stuffed.'*

**Horizon Travel Personas 2026 v3**

2. **'Ready and able to assist'**: Staff also need to have the knowledge, training, resources and autonomy to assist (which could include medical aids or real time updates) at every point across the consumer journey. Staff can be optimal only if they have reliable, well-designed systems to use. As in the previous stage, reports in Stage 6 highlight that this is of critical importance for those who rely on Passenger Assistance Services to move through their journey and who need to trust that this formal support system is comprehensive, joined up and reliable.

*'No one seems to be taking responsibility for reminding people, I know there's the announcements, but we'd all feel totally safer I think if someone was going up to people reminding them.'*

**QSM October 2021 Results.pdf**

*'Check-in is very easy, and if like me you're not too good with the machines, there is always a member of staff willing to show you how it is done.'*

**LHR - Heathrow - Customer Ease and Enjoyment Feedback - Kokoro\_Mar 20.pptx**

*'...Customer service should extend help at the soonest and nearest reach and wherever a passenger needs, maybe with digital information available to passengers for further indication when needed.'*

User, 35-44, Female, Chinese, China

**Customer Service Week v1.0**

Clear, simple and up to date information should always be at staff's fingertips across the airport (likely using smart tech) and absorbed as knowledge ready to share with passengers.

**Horizon Report - Service Signatures Research**

*'I'd prefer to speak to a person... it's more helpful, I'm more comfortable face-to-face.'*

**Dec 9th Final Report of the OTZ Research Findings T2 and T5**

The contrast in satisfaction between tech-enabled passengers and those who relied on face-to-face service is particularly marked at three key points – during dwell time (+5.8%), on board the aircraft (+8.1%), and when collecting luggage at the carousel (+8.6%).

**passenger-it-insights-2019.pdf**

*'If everything is connected and actually works and is seamless, that's great. I just doubt that integration will be universal. I need a human nearby.'*

**Customer Service Week v1.0**

For future master planning at Heathrow, it's important to invest further in e-gates whilst ensuring reliability, appropriate guidance and staffing to offset the concerns of those that still rely on manual gates.

**Horizon Arrivals report v1.0.pptx**

On the needs of arriving 'Passengers Requiring Support', *'mobility chair was not delivered to the aircraft door, but to a point 50m away. [Passenger] could not walk to the mobility chair and had to ask another passenger to retrieve the chair.*

*Passenger also commented that terminal staff should encourage [other] passengers to keep moving and not congregate in walkways as it is difficult to navigate around passengers who are just standing in passageways etc.'*

**Passenger Segments Review 2023.pptx**

On the needs of 'Premium' arriving passengers, one passenger requested a special assistance wheelchair however this was not provided at the arrivals gate as promised. *'Passenger elected to walk through the landing processes but was disappointed that the [wheelchair] request/process had failed.'*

**Passenger Segments Review 2023.pptx**

Travelling can be a stress trigger for those who have to depend on others, so the passenger assistance should represent certainty and control. For the system to work, PA customers need to be able to resign agency to those helping and be able to trust in the process (all uncertainty removed). PA is critical for affording them the ability to travel.

**Heathrow Passenger Assistance Service Journey Assessment Debrief  
270323.pptx**

Overall, it can feel a disjointed experience – being moved from pillar to post, with different people looking after you, and being left to wait in different periods with no-one to help you. *‘You shouldn’t have to walk miles to get to a desk to get a wheelchair. Someone should come and greet me outside. It defeats the object.’*

**PRM Volunteer Trial- Caroline Thompson.pptx**

*‘Autonomous wheelchairs are a great innovation, but I’d also like to see investment in staff training, better communication systems, and reducing wait times with the current service. Some people will always prefer or need human help, so improving the existing system is just as important.’*

**Horizon x Human8 Autonomous Wheelchairs Final**

All staff should be recruited as people suited to the unique requirements of the roles who enjoy proactively engaging people, have great emotional intelligence, take initiative, and communicate well without being intimidating.

**12 Sept CTA Pre-Compliance Resourcing Report Final.pdf**

Clarity and guidance are as important as speed for travelling families. Helpful, well-informed staff interactions can make parents feel supported, while confusion or poor coordination quickly undermines confidence.

**10409 - Heathrow Premium Customers - Report VF\_C**

3. **‘Support and inform in adverse circumstances’**: This theme centres on staff being proactive, when things go wrong, making contingency arrangements, volunteering (accurate) information and giving emotional support to passengers and handling complaints. Increasingly, delivering support and reassurance is achieved via technological solutions (real time updates etc.) however the evidence in Stage 6 reiterates that human interaction is especially important when problems occur and this is more often the case for older consumers (over 55s) – and passengers requiring support for their personal circumstances.

Dissatisfaction with complaint handling has risen across all metrics since November 2019... poor communication and lack of information during complaint handling remains by far the biggest issue of dissatisfaction for passengers.

**SavantaComRes\_CAA\_AviationConsumer\_Wave 9\_Report.pdf**

*'The most important thing is you just tell us what's going on. There's nothing worse than 'the unknown'... once we know the situation, we're then able to make a decision on what to do next.'*

**Customer Needs in Security.pdf**

Top needs to improve travel disruption experience: 1 Real time accurate travel notifications. 2 Automatic flight re-booking & provision of passes. 3. Face to face interaction who will arrange further travel.

**IATA GPS-2018 Highlights**

*'If my flight is 40 mins late when I'm going there for a meeting... If I'm not told how and for how long it really annoys me. I would prefer to be told – I don't mind waiting but I want to know how long it's going to be.'*

Leisure VFR

**[WP01] What matters to passengers - Qualitative research findings Nov 2017.**

**Caroline Thompson Associates**

*'The worst experience is when your flight is delayed and Google has better information than the staff. I flew to Croatia from Heathrow via Munich, and the 1st plane was delayed. Nobody at Heathrow could help or tell me if I could still make my connection.'*

**Customer Service Week v1.0**

*'We got stranded at Gatwick, no assistance from the airline staff, our luggage was left out in the rain for hours, we had no help, we were left to fend for ourselves, and ended up having to rebook the flight.'*

**civil-aviation-authority-aviation-consumer-survey-wave-12.pdf**

To feel safe and comfortable throughout their journey, customers want to be informed about the 'why' behind decisions that seem out of the ordinary for them. Otherwise, they are left to guess, which can cause frustration and foster resentment. ... *'Be honest with your passengers. Do not give them wrong information, do not make guesses. If you have the information, communicate it clearly.'*

### **Horizon x Human8 - Heathrow service signatures report - v1.0.pptx**

The steps where travellers expect a human touch also happen to be steps where travellers are not in the most positive emotional mindset. Beyond the need for a human touch, the results show that travellers are seeking reassurance that someone will be available to provide a helping hand, should they encounter any issue.

#### **2024-ASQ-Global-Traveller-Survey.pdf**

After a connecting flight between Heathrow and Manchester was cancelled, Isabel and her husband were given conflicting information by different members of staff and felt like they were going round in circles. However, a member of the PRS service team was able to guide them towards the right place and help book them onto a new flight. Isabel feels that Heathrow can go above and beyond with their service by ensuring all members of staff know what to do in situations like this!

#### **Customer Service week customer cards v2**

For many, a disruption such as a delay or a flight cancellation can feel highly stressful. These critical moments become opportunities for staff to step in and make a difference, turning frustration into reassurance through proactive, empathetic support.

#### **2026-ACI-ASQ-Global-Traveller-Survey-Report**

*'[I would have liked if] they said something automatically, like flight cancelled, eligible for full refund + compensation. [...] Let me know how you're going to take care of me right then and there.'*

#### **Heathrow\_Outage\_Research\_FullReport\_v2.0**

T5 pain points: 'Lack of staff support – a lack of staff presence or poor communication from staff when there are delays / cancellations are received negatively – even more so for passengers requiring support.'

#### **Horizon Travel Personas 2026 v3**

### **B. I feel looked after:** this theme includes:

1. 'Courteous service': from helpful and professional staff. Whilst courteous service is a hygiene factor for all travellers, passengers who require support (whether using Passenger Assistance Services or not) have a distinct need for acknowledgement of and accommodations made for their specific circumstances.

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. This is more important to OVER 35s (3.0) than UNDER 35s (4.2).

**Passengers Priorities Post COVID-19 19 - Wave 3 - October 2021.pptx**

*'I'm usually feeling most stressed at this point. Security staff at Heathrow are pretty miserable and rule bound.'*

**Customer Needs in Security.pdf**

*'Nothing in particular comes to mind, but just politeness, efficiency, non-patronizing assistance is sufficient. Just doing their job pleasantly is usually enough for most people.'*

Potential user, 45 -54, Female, British, UK

**Horizon Autumn 2018 Summary incl Topic Summaries**

*'We wanted somewhere for breakfast. The nice man at security suggested we tried Giraffe and it was excellent.'*

**AW169 Presentation.ppt final. Alex Walley**

Customers have two types of fundamental needs from PA - practical essentials and human extras. The human extras centre on being treated with compassion and respect and the way the service is delivered is paramount to customers.

They want: politeness, professionalism, clear and proactive communication, reassurance of progress and opportunity to explore the airport where possible.

**Heathrow Passenger Assistance Service Journey Assessment Debrief  
270323.pptx**

On their reasons for giving a rating of 'Poor' or 'Extremely Poor' for the non-trial lane, *'The staff was very rude. I have travelled for 37 years and never come across such [a] situation. Just because I did not seal the plastic bag I had to do all the extra check for no reason and I missed my flight. The staff needs to know what they are doing, it was a complete waste of time.'*

**Epinion T2 Security Trial - December 2022 + January 2023 - Report.pptx**

*'They were amazing. Super friendly and helpful. They ask you questions, they manage your expectations....and all that makes you feel safe and cared for....On other occasions there is all the anger, the pressure, the lack of eye contact except when you do something wrong. ...They absolutely should keep [the PRS security trial lane]. They made the whole journey feel good.'*

**Final PRS PRM Security Lane Trial T2\_Caroline Thompson findings v1.pptx**

*'I was confused, I thought I was doing the right thing. They could have been more helpful, it was almost like the attitude that came across: "you stupid woman, you got to check-in first" (not actually worded like this by staff), they could have been more helpful'*

**Tobii - Heathrow Wayfinding T3\_CLIENT v1.1**

*'It was nice to have the 'Good Afternoon. It feels more welcoming. I'd like someone to tell me about that new rule. Once you tell me I know it.'*

**12 Sept CTA Pre-Compliance Resourcing Report Final.pdf**

Carol most appreciates the warmth and humanity of airport staff. She feels that processes such as security can be anxious for her as she is easing back into the travel experience and feels reassured when staff communicate things in a kind, calm way.

**Human8 Horizon Service in Security case studies.pptx**

*'Heathrow was shown badly today due to immigration area / young staff on phones / not interested, shouting and generally rude - first point of contact with UK looks terrible.'*

**LHR QSM Immigration Deep Dive (2025).pptx**

2. **'Noticed and valued'**: attentiveness from staff making passengers feel welcome and respected, and as though they matter. There is evidence that for PRS and PRM passengers there remain certain parts of the consumer journey where there is room for improvement in feeling 'noticed and valued'. There is a heightened need amongst this group for respectful assistance which acknowledges them as a person rather than an operational challenge to be overcome. For some passengers, receiving rewards and privileges (e.g. through loyalty schemes) has a part to play in feeling valued.

Security is the key area where passengers requiring support have not felt 'cared for' at all...*'I need staff/other passengers to be understanding if I make mistakes, to know that I won't be made to feel embarrassed or ashamed, to feel valued and taken seriously - to be treated as a human being, not a 'package.'*

**Customer Needs in Security.pdf**

*'You want them to want to help you, not just that they have to help you.'*

UK Leisure Direct

**[WP01] What matters to passengers - Qualitative research findings Nov 2017.**

**Caroline Thompson Associates**

*'I always think it helps and goes above beyond when help is offered proactively without any prompting or needing to ask.'*

User, 55 -64, Male, British

**Horizon Autumn 2018 Summary incl Topic Summaries**

*'They'd even offered to go and get me a wheelchair but I was tight on time and wanted to walk as much as I could before my long flight, their spotting that I needed a little assistance made all the difference to my journey.'*

User, 55-64, Female, Welsh, UK

**Customer Service Week v1.0**

*'I expect the staff to be genuinely friendly, knowledgeable, and human. I want to feel like an individual not just another customer. Just a simple genuine smile and interaction can do that.'*

Potential user, 25 -34, Female, UK British

**Horizon Autumn 2018 Summary incl Topic Summaries**

The ideal rewards scheme should not feel unobtainable. The rewards should be appropriate for the status of a member and should differentiate at higher statuses. The points should not expire.

**Heathrow Rewards Report - July 2018**

Whilst passengers' priority is to get to their gate in time, during busy times, they can feel 'sidelined' – a logistical challenge rather than a human with needs. Passengers don't feel their welfare (physical and emotional) is a proper priority – particularly when there are long unexpected wait times in busy periods.

**PRM Volunteer Trial- Caroline Thompson.pptx**

*'You just get dumped here. There's no sense of your needing a cup of coffee or a snack on the way. The water fountain is broken. They say you'll have to buy a bottle. But there is no help to get it.'*

- UK Res, Direct, LH, Solo Flyer, F, 80s

**PRM Volunteer Trial- Caroline Thompson.pptx**

The staff focus is on getting people from A to B i.e., like delivering a parcel. Thinking about the customer experience and perspective was not a big priority. The staff want people just to sit tight and wait until it is their turn to be moved to the gate: Passenger welfare is sidelined. It feels like a logistics exercise not a human service.

### **PRM Volunteer Trial- Caroline Thompson.pptx**

*'It's been fine, but not wonderful. The staff at the Plaza Premium lounge in T2 at LHR almost always seem a bit distracted if not unfriendly. I'm an older white female traveling in comfortable clothes - and so I have wondered if my appearance suggests to them that I am not in the right place. They seem suspicious when I show up and ask to come in.'*

### **Horizon - Airport Lounges Report v1.pptx**

Attentive staff ensure passengers feel welcomed. Their knowledge and advice help passengers discover products and deals. A small minority find attentiveness off-putting, especially if tired.

### **Heathrow Purchase Motivations main story deck CG**

Travellers with special assistance value environments that respect their time and dignity. Physical accessibility alone is not enough; emotional accessibility matters too. Spaces should foster dignity and inclusion rather than segregation. Providing choice, comfort, and human warmth can transform waiting from passive endurance into a positive moment of anticipation.

### **10409 - Heathrow Premium Customers - Report VF\_C**

Lisa has had very positive experiences at Heathrow and feels that she and her companion who uses a wheelchair are always treated kindly, compassionately and with dignity throughout the security process.

### **Human8 Horizon Service in Security case studies.pptx**

For people who are infrequent visitors to Heathrow and/or big international airports, Welcome and Compliance Hosts have a calming effect and make Heathrow feel less intimidating and off putting: *"When somebody travels, the first thing that one wants is to be welcomed. Of course it makes a difference. It's like a person who smiles makes you feel welcome."*

### **12 Sept CTA Pre-Compliance Resourcing Report Final.pdf**

Wheelchair users don't appreciate when they're pushed straight through to their gate, bypassing the facilities of the departure lounge. This often results in:

- Wait times feeling longer as they are sat in one place for a long period of time waiting for their flight
- Feeling devalued or like less of a passenger, or like they are inconveniencing staff if they ask.

*‘Assistance is not only about accompanying someone from point A to point B, sometimes I need to use the restroom, buy something in a shop, etc. These things should be considered.’*

**Horizon x Human8 Autonomous Wheelchairs Final**

**C. Treat me as an individual:** This theme reflects the ideas of the airport being able to actively engage with consumers at a personal, individualised level, and anticipate personal wishes of consumers to make them feel special.

1. **‘Personal interaction’:** during personal (or automated) interactions, calling the passenger by name; recognising and responding to individual needs. This is a heightened need for passengers requiring support, who want to feel that their specific requirements have been acknowledged and proactively accommodated.

*‘I want to feel like an individual not just another customer. Just a simple genuine smile and interaction can do that.’*

**Customer Needs in Security.pdf**

Passengers expect colleagues to proactively seek out groups like lone parents, PRS, non-English speaker or minorities. Staff should have a range of customer centric behaviours and tools at their fingertips (empathetic, polite, adult-to-adult manner, good communication with individual passengers, ready to go initiatives that staff can draw on proactively when problems arise).

**Customer Needs in Security**

*‘Excellent service means tailored service; I love it when I am treated on a personal level.’*

**170531 Heathrow DNA Programme Integrated debrief FINAL**

For experiences to stand out, customers want service industries to better predict their behaviour and have malleable, personalised solutions.

**Customer Service Week v1.0**

*‘The automated entry gate recognised my number plate and greeted me by name (which was nice)’.*

**15-075519-01 Heathrow Surface Access - Final Report FINAL v2**

Ultimately, passengers want staff members to be able to use autonomy to identify situations and provide personalised assistance to help them.

**Heathrow resilience debrief\_Updated\_ 14.02**

On their reasons for giving a rating of 'Poor' or 'Extremely Poor' for the trial lane, one passenger reported that they were carrying their hungry baby which was crying. Security staff were reportedly rude when dealing with said passenger and asked them to 'remove their shoes' whilst they were still holding their baby. The passenger subsequently raised the issue that there appeared to be no empathy from staff towards mothers or those carrying children.

**Epinion T2 Security Trial - December 2022 + January 2023 - Report.pptx**

Passengers want to feel that airport staff put themselves in their [i.e. passengers'] shoes. ... *'I think there's a danger that airport staff get disconnected from the passengers because they see so many every day, whereas for the passenger, it could be the trip of a lifetime, or going to someone's funeral.'*

**Horizon x Human8 - Heathrow service signatures report - v1.0.pptx**

Stefanie values friendly and helpful staff who can alleviate stress during the security process. She enjoys seeing staff be a little more 'human' and display nuanced and sensible judgement. She appreciates that she has only been body searched by women at security.

**Human8 Horizon Service in Security case studies.pptx**

While biometric and automation technologies play a central role in creating more efficient journeys, human touchpoints – such as gate-to-gate assistance and personalized concierge services – remain equally important to delivering a highly important sense of care and emotional connection.

**2026-ACI-ASQ-Global-Traveller-Survey-Report**

Staff being able to make allowances for individuals is much appreciated - He shared a memorable experience at Heathrow where a customer service agent personally met him after a delayed flight, fast-tracked him through security, and through a 'secret door' - escorting him to his gate just in time for his connection.

This kind of personalized and proactive assistance left a lasting positive impression and earned his loyalty.

**Customer Service week customer cards v0.1.pptx**

2. 'Feel special': providing care, attention or services that make the consumer feel special—differentiating their experience and making it memorable.

Paid-for Fast Track is dismissed by First and Business passengers as they feel it is unfair and 'levels out the playing field' taking away their 'competitive advantage' and feeling of being special: *'not in my back yard. I always fly Business or First Class at Heathrow, and I don't want a person who's only paid a tenner to slow me down'.*

**Customer Needs in Security.pdf**

*'The Fast Track Service is awesome; you not only jump the queue but they assist you with the passenger and baggage at times. I am grateful for the extra help at the airport.'*

User, Female, 45-54, Canadian, Canada.

**Horizon Arrivals report v1.0.pptx**

*'Dubai is amazing, they really acknowledge you as an individual and they look at ways to help you, they don't wait for you to ask.'*

**WP05 10641312 Heathrow Airport Customer Valuation Research\_Final Report\_DRAFT. Systra**

Narita Airport *'Amazing baggage collection experience! They had people wearing gloves to gently position arriving bags on the conveyor and turn the handles upwards.'*

**Horizon Report - Service Signatures Research**

*'Just a short note to express my heartfelt appreciation to Ms. Livana who provided special assistance to my mom at Heathrow Terminal 4. Due to heavy traffic at the airport coupled with lack of staff, I waited for close to 2 hours before Livana wheeled by mom out to meet me at Terminal 4 arrival hall together with an extremely heavy luggage. Despite that, Livana greeted me with a big warm smile. As my mom has a bit of mobility issue and hence could not walk far, I asked whether Livana could help wheeled my mom to the Elizabeth Line underground station. She agreed without hesitation and before parting us at the station, she wished my mom a good stay in London. [...] Livana performed her duty with care, patience, sincerity and utmost professionalism. Her compassion and positive attitude throughout were commendable and exemplified what a top notched service should be.'*

*T4 Arriving Assistance Passenger - July 2022*

**2022 Customer Satisfaction and Engagement Review.pdf**

John recalls a time that a member of staff personally walked him to his gate to help him find it while the airport was undergoing some construction. John notes

that not only was this experience helpful, but he really felt that member of staff went the extra mile to help him find his gate.

**Customer Service week customer cards v2**

[Luxury Premium segment passengers] want exclusivity and to feel special – acknowledgement by name, status recognition and a luxurious environment are all key to their experience.

**10409 - Heathrow Premium Customers - Report VF\_C**

Ultimately, it was the feeling of being genuinely taken care of that made this experience stand out. It wasn't just about the comfortable seat or the good food, but the human element of service that was attentive, personal and went above and beyond expectations.

**Premium Insights - What we know Update 25 09 FINAL**

Listed below are the reports which provide the insight for each theme, and the evidence score\*, which gives an indication of the overall strength of evidence.

'Cared For' Themes:	No. reports with supporting evidence	Evidence score
<b>Active assistance</b>		
• Always visible and available	150	816
• Ready and able to assist (incl. via new tech)	110	601
• Support & inform in adverse circumstances	68	374
<b>I feel looked after</b>		
• Courteous service I can rely on	118	644
• Noticed and valued	105	571
<b>Treat me as an individual</b>		
• Personal interaction	76	414
• Feel special	44	241

\*The evidence score assigns a value to each report based on the 'quality score\*\*' for that report. The values for all the reports contributing to each theme are then added together to provide the evidence score.

\*\*The quality score is based on the rating of robustness and relevance for the report content - detailed in Appendix Methodology (section 2).

▲ Indicates higher rank position since stages 1-5

### Quality of the evidence

CARED FOR Referenced in 240 out of a total of 503 reports	
<i>Detailed analysis conducted using 215 key reports</i>	
6	118
5	97
4	20
3	3
2	2

The data and insight relating to more established areas of ‘Cared For’ (such as themes of ‘Active assistance’) is generally of a good standard. Reports often focus on tangible and widely understood aspects of interactions between passengers and staff. Consumer care is known to be important and potentially differentiating – and is a widely measured area of consumer experience.

For our detailed analysis of ‘Cared For’ we have been able to draw on 240 reports. 215 of these were determined as being high quality (reports with a quality score of 6 or 5), along with 25 medium / lower quality reports providing broad affirmation of the themes discovered.

One aspect of ‘Cared For’ that was less conclusive at Stage 4 still, was how passenger expectations have been evolving within the context of new self-service technology and other ‘non-human’ touchpoints. There is clearer evidence at Stage 5 onwards to demonstrate that passengers need reliable and dependable staff to be ready and able to assist with this. The increased evidence here has therefore strengthened our understanding of the ‘Cared For’ subthemes relating to self-serve support.

### Themes within this area



The themes uncovered in the reports are explored and evidenced in more detail below

**Key:**


**(H) identifies a passenger type or journey stage with heightened relevance to this theme / need**

**(E) identifies a passenger type or journey stage that is exclusively relevant to this theme or need (the theme / need ONLY applies to them)**

Theme	Needs & expectations within the theme	Key passenger groups	Key journey stage
<b>ACTIVE ASSISTANCE</b>			
	<ul style="list-style-type: none"> <li>The assistance that is available is well communicated.</li> </ul>	PRS (H)	Includes when booking

<b>1. Always visible and available</b>	<ul style="list-style-type: none"> <li>Assistance positioned at the right places, at the right times.</li> </ul>	PRS (H) Arriving passengers (H) Connecting (H) Tourists / those who are unfamiliar (H) Anxious (H) Non-English speaking (H)	Arrivals / OTZ (H) Check in counters (H) Security (H) Passport Control (H) Car park staff (valet parking, car park office) (H) Bus stops (H) Bag drop (H) Restaurants (H) Gate rooms (H) Immigration counters (H) Connections (H) Baggage reclaim (H) Anti-back door area (H)
	<ul style="list-style-type: none"> <li>Visible and identifiable (incl. uniform, information desk).</li> </ul>	PRS (H) Elderly (H) Families (H) Leisure (H) Females (H)	Arrivals / inbound (H) Taxi bay (H)
	<ul style="list-style-type: none"> <li>Support self-serve processes (some passengers prefer 'human' assistance e.g. bag drop, especially when things aren't working). </li> </ul>	Older (H) PRS (H) Time-pressured passengers (H) <i>Increasingly widespread across segments now as the demand for automation grows</i>	Bag drop (H) Arrivals / OTZ (H)
<b>2. Ready and able to assist</b>	<ul style="list-style-type: none"> <li>Staff capabilities: Knowledge and ability to respond to full range of needs from full care to ad hoc help.</li> </ul>	Older (H) Those with special assistance needs (incl. hidden disabilities) (H) Families (H) Those unfamiliar with Heathrow (H) Infrequent travellers / less confident (H) Connecting (long haul) passengers (H) Non-English Speaking (H) VIP (H) Tourists (H) UK Leisure (H) PRS (H)	Arrivals (H) At point of onward travel (H) Valet parking (H) Lounge (Independent lounge) (H) Security (not always visible extra need) (H) Bag drop (H) Passport Control (H)
	<ul style="list-style-type: none"> <li>System capabilities. </li> </ul>	PRS, especially PA users (H)	PA pick up points (H) PA drop off points (H) Check in (H)
	<ul style="list-style-type: none"> <li>Resources to assist e.g. information, timetables, leaflets, access to mobility aids etc.</li> </ul>	Those who may need medical care (H)	
	<ul style="list-style-type: none"> <li>Via new technologies.</li> </ul>	<i>No specific groups highlighted</i>	Security (H) Baggage (H)
<b>3. Support &amp; inform in</b>	<ul style="list-style-type: none"> <li>Staff on hand to proactively help with problems and crises (whenever these arise).</li> </ul>	All passengers, but can be more often needed by: PRS (H) Connecting passengers (H)	

<b>adverse circumstances</b>	<ul style="list-style-type: none"> <li>Keeping passengers fully informed in these circumstances (open and honest).</li> </ul>	Older (H)	
	<ul style="list-style-type: none"> <li>Emotional support.</li> </ul>	No specific groups highlighted  Anxious passengers (H) Younger (H) Infrequent flyers (H) Limited financial resource (H) Less tech literate (H) Non-English (H) Families (H) Travelling for an 'event' (H)	
	<ul style="list-style-type: none"> <li>Practical support (e.g. make contingency arrangements).</li> </ul>	Connecting passengers (H) Families (H)	
	<ul style="list-style-type: none"> <li>Complaints handling.</li> </ul>	No specific groups highlighted	
<b>I FEEL LOOKED AFTER</b>			
<b>1. Courteous service I can rely on</b>	<ul style="list-style-type: none"> <li>Reliable fulfilment of basic passenger-facing tasks and well presented.</li> </ul>	For all cultures	Car parking services, bus services (H) Security (H)
	<ul style="list-style-type: none"> <li>Courteous, helpful, good attitude, professional.</li> </ul>	VIP (H) Business (H) Tourists (H) UK passengers (H) Over 35s (H) PRS (H)	Security (H) Check in (H) Immigration (H)
	<ul style="list-style-type: none"> <li>Seamless service (across airport, airline and other agency staff).</li> </ul>	Disrupted passengers (H)	
<b>2. Noticed &amp; valued</b>	<ul style="list-style-type: none"> <li>Feel welcome, warm welcome.</li> </ul>	VIP (H) Tourists (H) Long Haul Connecting (H) Leisure (H)	VIP Lounge (H) Independent lounge (H) Ticket sales (Hex) (H) Train platforms (Hex) (H)
	<ul style="list-style-type: none"> <li>Feel like I matter / am valued / am respected.</li> </ul>	PRS (H) PRM (H) Bookers for VIP service (H) All cultures	Security (H)
	<ul style="list-style-type: none"> <li>Staff attentive, genuinely interested and go the extra mile (proactive in offering help and strong sense of empathy, strong service culture).</li> </ul>	Premium / VIP (H) Families (H) (Disrupted passengers) (H)	Meet and greet car parking (H) Independent lounge (H) Security (H)
	<ul style="list-style-type: none"> <li>Loyalty rewards / privileges (for economy travellers as well e.g. lounge access, fast track, speedy bag drop).</li> </ul>	Frequent flyers (H)	

TREAT ME AS AN INDIVIDUAL			
1. Personal interaction	• Use my name – including in automated interactions.	VIP (H)	Automated touchpoints like Long Stay car park (H) Departures VIP Lounge (H)
	• Recognise my individual needs and circumstances and respond to them (including language needs).	VIP (H) Special dietary needs (H) PRS including non-visible personal circumstances (H) Non-English (H)	VIP Lounge (H)
	• Provide personal care / service (note issue of using data). 	Elderly (H) First time travellers (H) PRS (H)	Independent Lounge (H)
2. Feel special	• Make me feel special / unique / differentiated / premium.	Premium / affluent (H) VIP (H) Business (H) Tourist (wanting entertainment) (H)	-
	• Actively anticipate my specific needs / desires.	VIP (H)	VIP Lounge (H)

### Relating the theme to consumer journey and key passenger groups

- **PRS and PRM** by definition will often have greater need for assistance and want to know what kind of assistance and facilities are available *prior* to their journey. It is essential that this is well-communicated to this group to ensure that they know up-front what is available. These passengers may experience issues that are not outwardly visible; they may also be reluctant to request information or special assistance, so it is important staff are able to recognise the wide spectrum of needs.
- **Less familiar & less confident passengers (including infrequent travellers, younger, elderly, anxious, arriving tourists)** have greater needs around visibility and availability of assistance, and staff who can respond effectively. They are more likely to rely upon staff support as part of their experience.
- **Premium / VIPs:** More prominently associated with needs at the ‘higher end’ of the spectrum around personalised and special treatment when travelling.
- **Arrivals and points of surface access** have greater unmet need for availability and consistency of assistance.
- **Departures and lounges** are the focus for ‘treat me as an individual’.

### Evidence tensions

One area of possible tension when considering the ‘Cared For’ need area is the tone or style of delivering consumer service. For some, a warm and personal welcome would delight whilst other consumers are looking for speedy, functional and efficient service. This will sometimes vary by

personal preference, passenger group (including support requirements and cultural differences) or stage in the journey – and understanding this will require staff sensitivity.

In earlier stages of the literature review we encountered mixed acceptance of new technologies such as biometric E-gates and self-serve bag drop, compare with the traditional use of a manned service. Whilst in later phases of the synthesis (including Stage 6) there is evidence that most passenger groups are now comfortable with automated processes, having adapted to these during the pandemic, the evidence suggests a sustained need for human interaction and support for navigation and troubleshooting. In addition, customer expectations for a more personalised experience affording passengers greater control over their experiences may be in tension with concerns over sharing the personal data needed to facilitate these (as explored in ‘Privacy’ within ‘Basic Comforts’).

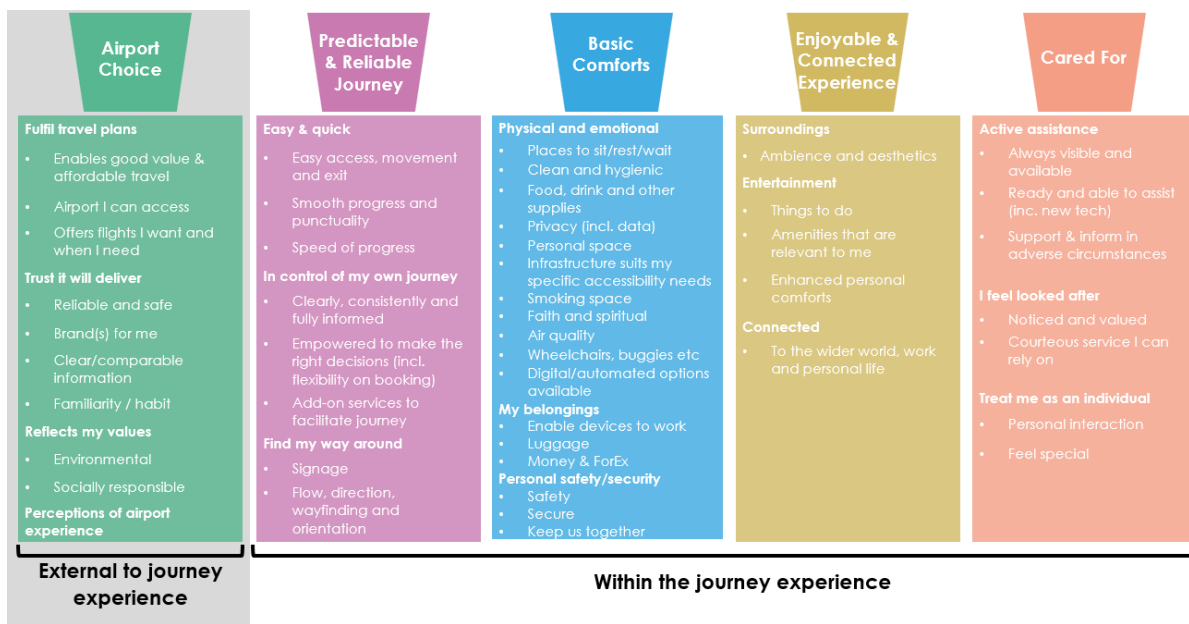
### Changing needs to monitor

#### **Automation and new technologies:**

As above, preferences for self-service and/or automation are changing rapidly as people experience and become familiar with new technology in airports. In particular, it will be important to understand how consumers want to be supported by staff, and what the optimum balance is, as well as what passengers need to feel comfortable to share their personal data.

## 5. Summary of the synthesis

This report sets out the evidence for consumer needs following all three stages of analysis. The diagram below provides a summary of the key themes within each of the need areas described.








### Overview of evidence gaps and changing needs to monitor





The quality of evidence underpinning the need areas is generally very strong across all five areas. There are few examples of conflicting evidence, but in many cases, this is because trends and/or technological developments are moving so fast that it is difficult to be conclusive about needs at a point in time.

The second and third stages of analysis addressed all significant gaps that had been identified at the first stage of analysis. We identified a number of new gaps at Stages Four and Five, reflecting changing contextual trends. A summary of need gaps identified in Stage One, how these have been addressed, and any subsequent gaps and areas for monitoring is shown below:

Need area	Evidence gaps and changing needs	Status at Stage 6	Commentary – gaps and future monitoring
<b>Airport Choice</b>	Environmental and social responsibility	Increased evidence at Stage 5 but less evidence	<ul style="list-style-type: none"> <li>Not top of mind considerations for most when travelling.</li> <li>However, this area still needs to be monitored:</li> </ul>

		on current needs at Stage 6	<ul style="list-style-type: none"> <li>– Likelihood it will grow in future e.g. popularity of environmentalism among young people.</li> <li>– Potential impact of external factors on passenger decisions e.g. the rising cost of living making sustainable choices more expensive etc.</li> <li>– Need better understanding of prioritisation between environment and other factors.</li> </ul>
	Need for more destinations and flight options from an expanded Heathrow	✓ Gap plugged at Stage 6	<ul style="list-style-type: none"> <li>• Evidence suggests availability of flight options is a critical differentiator and that low cost options are particularly important given the current cost of living context</li> </ul>
	Perceived value of an aspirational airport brand	✓ Gap plugged at Stage 5	<ul style="list-style-type: none"> <li>• Evidence suggests ‘premium’ airport offer (cosmopolitan, dynamic, exciting, globally recognised) can be a driver for airport choice for some - particularly international passengers – and top airline brands reassure.</li> </ul>
	Needs specific to people with non-physical health needs	✓ Gap plugged at Stage 3	
	Clarity on meeting points	✓ Gap plugged in Stage 3	
<b>Predictable and Reliable Journey</b>	Elements providing greater autonomy over journey	Changing needs 	<ul style="list-style-type: none"> <li>• ‘Add-on services to facilitate my journey’ added at Stage 5 – further evidence required around tension between appetite for such services and financial pressures (given some services currently paid for)</li> </ul>
<b>Basic Comforts</b>	Are all basic comforts being met?	Initial gaps plugged, new gaps in Stage 5 	<ul style="list-style-type: none"> <li>• Much improved evidence for ‘Basic Comforts’ themes in Stage 3 of Synthesis. Specific investigation into washrooms, device charging, best practice in waiting areas, best practice in cleanliness, passenger health and safety perceptions, needs at gate, multi-faith rooms and airside smoking.</li> <li>• Some evidence in Stage 4 that basic expectations continue to change; underlying gradual increase in ‘basic’ expectations, with changing shape of expectations post COVID-19.</li> </ul>

			<ul style="list-style-type: none"> <li>• As of Stage 6, gaps surrounding long-lasting needs around COVID-prompted cleanliness measures (e.g. hand sanitiser).</li> <li>• Evidence on whether Cash/Forex is still a need (very limited evidence at Stage 6).</li> <li>• Stage 6 has seen a continuation in demand for greater affordability as a response to inflationary pressures - key area to monitor for its impact on consumption at the airport.</li> </ul>
	How do 'Basic Comforts' vary by segment	✓ Gap plugged in stages 2 & 3	<ul style="list-style-type: none"> <li>• More clarity on needs of e.g. families; different airport user typologies and food typologies (not comprehensive).</li> </ul>
	Technology needs (apps, automation, self-serve, biometrics)	Continues to be a developing area 	<ul style="list-style-type: none"> <li>• Addition of automation as standard theme in Stage 4.</li> <li>• Needs in flux as new technologies are introduced: more clarity needed as trends change and these are rolled out more widely.</li> <li>• More information required for impact on expectations around data privacy - Some cultural (and demographic) differences in willingness to share personal data</li> </ul>
	Overall basic culture-specific requirements	Changing trend  	<ul style="list-style-type: none"> <li>• Evidence of continued change in cultural (and generational) needs in early stages of analysis re. privacy, technology, food, money/forex etc.</li> <li>• Limited new evidence in Stage 6</li> </ul>
Enjoyable & Connected Experience	Where to focus on ambience	✓ Gap plugged in Stage 2	
	Where to focus on sense of place/airport identity?	✓ Gap plugged in Stage 2	
	Less tangible expressions of 'enable connection to my life'	✓ Gap plugged in Stage 2 and 3	
	Demand for enjoyment and	Changing need to monitor	<ul style="list-style-type: none"> <li>• Evidence at Stage 6 highlight growing appetite for greater enjoyment at the airport, beyond the basics, and also in support of frictionless travel</li> </ul>

	special treatment		<ul style="list-style-type: none"> <li>Given the impact of the changing economic climate on people’s choices, demands in this area should be monitored.</li> <li>Needs across segments to be explored, given usage of traditionally premium spaces by broader customer base</li> </ul>
	Needs around complaints handling & resolution	✓ Gap plugged in Stage 2 and 3	<ul style="list-style-type: none"> <li>Stage 2 evidence showed improvements in complaints handling satisfaction.</li> <li>Stage 3 resilience research also provided additional evidence.</li> </ul>
	Need / desire for automated care vs. human interaction	Changing trend  	<ul style="list-style-type: none"> <li>Greater clarity around needs for automation vs human interaction – particularly in light of new technologies for PRM, e.g. autonomous wheelchairs</li> <li>Cultural differences in tone and style.</li> </ul>
<b>Across all need areas</b>	Specific needs of passengers with ‘unseen’ personal circumstances (e.g. cognitive or psychological), as well as visible support requirements	✓ Gap plugged but an emerging area to monitor 	<ul style="list-style-type: none"> <li>Extensive study incorporated into the synthesis at Stage 3 into needs of passengers requiring support, with focus on cognitive, psychological and sensory personal circumstances.</li> <li>New reports during Stage 4 relating to invisible disabilities, growing numbers of PRS and experiences during and post-pandemic.</li> <li>Several reports at Stage 5 that focussed specifically on PRS/PRM needs in a wide range of settings.</li> <li>New theme for ‘Infrastructure suits my specific accessibility needs’ added due to increased specific evidence – to be monitored for further developments.</li> </ul>
	Details of cultural needs of different groups and specific significant foreign traveller groups	Evidence has increased but further research required	<ul style="list-style-type: none"> <li>At Stage 6 further quantitative reports mention differences in needs for non-UK travellers, but there is a gap around specific cultural requirements of some groups (including religious needs). Many groups are still underrepresented.</li> </ul>
	Needs of potential next generation of consumers	Ongoing research required	<ul style="list-style-type: none"> <li>More research needed to understand the future of aviation as Gen Z and younger generations continue to enter the air travel market.</li> </ul>