Consumer attitudes to journey disruption

A qualitative research report

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CAA Foreword

The UK has some of the busiest and most productive airports in the world, facing many challenges in maintaining day to day operating resilience. It will be at least 2025 before any new runway capacity in the South East of England will be opened, so the aviation industry must continue to work towards making existing infrastructure more resilient.

In the CAA's Strategic Plan for 2016-2021, we committed to thinking creatively about how existing capacity can be planned and operated to meet stakeholders' expectations, and what the CAA can do to ensure this issue is addressed to further the interests of consumers.

We therefore commissioned an initial, exploratory piece of qualitative research to help us:

- Understand the attitudes of consumers at London/South East airports[1] towards day-to-day journey disruption that results from runway congestion and capacity constraints rather than significant disruptive events, as well as the effectiveness of operational planning; and

- Form a view of how consumers view the trade-offs between capacity, cost and service level and the extent to which resileince (or the lack of it) is an issue at London/South East airports.

There were a number of positive findings from the research. However, the findings also highlighted some issues where improvements are needed.

The findings of this qualitative research will be used to help us develop evidence-based policies which reflect consumers views, and is intended to inform a further dialogue and action with the aviation industry on how to improve airport resilience.

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[1] Heathrow, Gatwick, Stansted and Luton airports.

1. Executive summary

1.1 Introduction

This qualitative research has been commissioned by the Civil Aviation Authority (CAA) to update and expand its existing evidence in order to provide:

- A particular focus on consumers' views on *day-to-day* journey disruption, caused by runway and airport congestion, rather than disruption which is related to significant adverse events, as well as the effectiveness of operational planning .

- A better understanding of *informed* consumer perceptions and expectations with respect to journey disruption, including once they have been exposed to materials explaining disruption and possible trade-offs to manage or reduce this.

- Specific intelligence on consumers using *four London airports*: Heathrow, Gatwick, Stansted and Luton.

A qualitative approach was used for this research and the overall programme comprised of:

- 10 focus groups with a cross-section of local (London/South East-based) recent users of the four London airports.

- 20 depth interviews with additional specific passenger types who recently used Heathrow Airport (passengers with restricted mobility or PRM[2], international connecting passengers, domestic connecting passengers and foreign resident passengers).

A 'deliberative-style' approach was taken in the research. This involved exposing participants to some facts on journey disruption, as well as ideas for reducing or managing disruption and the associated trade-offs, for their consideration. This material was introduced once an initial unprompted discussion of perceptions and expectations had already taken place so it would be possible to compare spontaneously held views with those that developed in response to the stimulus.

The research was conducted between 16th August and 7th September, 2016 and, in total, 90 consumers took part.

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[2] These passengers are covered by the regulation EC1107/2007 which aims to ensure such people have the same access to air travel as other passengers. Article 2(a) of the Regulation defines' disabled person' or 'person with reduced mobility' as meaning any person whose mobility when using transport is reduced due to any physical disability (sensory or locomotor, permanent or temporary), intellectual disability or impairment, or any other cause of disability, or age, and whose situation needs appropriate attention and the adaptation to his or her particular needs of the service made available to all passengers.

The findings will be used to help the CAA develop evidence-based policies which reflect consumer views, and is intended to inform a further dialogue with the aviation industry on how to improve airport resilience.

1.2 Key findings

1.2.1 Consumers' understanding of journey disruption

Perhaps unsurprisingly, the extent to which journey disruption was top-of-mind to participants in relation to air travel depended on whether and how recently they had experienced a disruptive issue and how significant this was felt to be. Their extent of focus on disruption was also related to other factors such as how regularly and why they fly, and how they feel about flying. For example, regular flyers were more likely to have been affected by disruption but tended to be less concerned about disruptive events than infrequent flyers.

Notwithstanding these differences, when the term 'disruption' was introduced in the discussions, participants shared a relatively wide definition of the types of issues that could disrupt or cause inconvenience in their journey. This went well beyond flight delays and cancellations to include a range of other disruptive events that could take place within airports, as well as with respect to surface access to airports.

It was understood that both significant events and day-to-day factors could contribute to disruption. Participants were able to nominate a range of possible causes which included a number that were specifically related to capacity constraints (such as staff shortages or knock-on effects from earlier issues).

1.2.2 Perceived impacts of journey disruption

There was a hierarchy of seriousness perceived among the types of disruption participants identified, with flight delays, cancellations and lost luggage believed to cause most ongoing inconvenience and potentially adverse impacts to passengers overall.

However, it was felt that other disruptive issues within airports, such as long waits and queues, could also cause passengers irritation and stress, and detract from the overall travel experience.

With flight delays, arriving late at the destination was perceived to have most impact as this could affect passengers' onward plans. However, a delayed departure time, whether or not this could be made up in flight, could also cause inconvenience, particularly if the passenger is confined to the aircraft or to an area in the airport that is crowded or has limited seating or facilities. This is because such waiting environments lack comfort and make it difficult for passengers to use their time productively.

The degree of impact of a flight delay, cancellation or lost luggage was also believed to depend on the circumstances of the trip and particularly if there would be knock-on effects, such as to connecting flights or events, and associated consequential loss.

Certain types of passengers, for whom air travel was believed to be more challenging generally, were expected to be particularly affected by any disruption. These included PRM, elderly flyers, those travelling with young children and nervous flyers.

How participants used their time in the event of disruption depended to a large extent on how conducive their environment was to waiting and how much information had been provided to them.

A number had modified their own flying behaviour to avoid or reduce the impacts of any potential disruption. These adaptations included allowing additional time, avoiding certain times of day and taking more or only hand luggage.

Most did not spontaneously consider the impacts of disruption on the aviation industry or consumers generally. When prompted, participants identified that disruption could have a financial cost to industry but they did not make a further connection to the possibility of increased airfares.

1.2.3 Consumers' views on current levels of journey disruption at London airports

Overall, disruption at London airports was not spontaneously identified as representing a major, ongoing problem for passengers currently. This is partly because a certain level of journey disruption was regarded to be both inevitable and acceptable given the complexity of aviation – and this was factored into consumers' expectations and preparations. It also relates to a perception that air travel is more efficient than other types of public transport - for example, rail - and that the incorporation of more technology into the process is helping to increase its efficiency. As such, the prospect of being significantly affected by disruptive events was regarded as the exception rather than the rule.

However, there was seen to be room for improvement across all airports in the efficiency of day-to-day processes, response to problems and, particularly, the quality of information and welfare provided to passengers in the event of disruption.

There were also some differences in how the four London airports were perceived with respect to disruption. Gatwick, Stansted and Luton were each felt to have relatively more budget carriers, short haul flights and inexperienced leisure passengers, compared to Heathrow. This meant that these airports were sometimes seen as being more susceptible to flight delays and other forms of disruption. In addition, disruption levels were linked to the perceived quality of the infrastructure and level of staffing at different London airports, with Luton and Gatwick subject to most criticisms on these aspects.

When delay statistics were provided, a significant number of participants felt these to be lower than they expected and indicative of good performance. This was particularly the case for Heathrow, given its size, and also once briefed on the capacity constraints it operates under. On the other hand, Gatwick stood out for having comparatively poor performance and this fitted with some people's experience of using this airport. A number were also concerned to know that the incidence of delays is increasing in three of the four London airports explored in this research.

Participants were very nervous about the possibility of airports and airspace getting busier in the future, causing not only more disruption but also more pressure on safety and security measures.

1.2.4 Consumers' views on the current industry response to journey disruption

Participants felt that certain types and causes of disruption were more acceptable than others. They were most likely to tolerate issues related to adverse events that were believed to be beyond the control of airlines or airports, as well as delays in order to fix mechanical problems and ensure the safety of passengers. Conversely, there was a general consensus that 'unnecessary disruption', especially if this was associated with perceived insufficient resourcing, planning or contingency measures, was the most irritating.

A number of parties were perceived to share responsibility for minimising and managing disruption, with both airlines and airports believed to play an important role. It was believed to be sometimes difficult for consumers to ascribe responsibility for disruption so it was seen as critical that there would be good behind the scenes collaboration and no buck-passing of blame.

A key priority for consumers in the event of disruption is to be informed promptly and effectively. Participants were highly critical of how passengers are currently informed, particularly in the event of flight delays. This criticism was levied on all airlines and airports, and was not confined to those operating out of London.

Without adequate information, passengers could feel 'in limbo', and unable to relax, prepare themselves for the flight or do anything productive during the wait period. The absence of a credible explanation of the reason for a delay could also cause passengers considerable stress and anxiety, including about the safety of the aircraft.

1.2.5 Measures suggested by consumers to reduce and manage disruption

Participants had a number of their own (unprompted) ideas about additional measures to reduce journey disruption and minimise the impacts of disruption on passengers.

Suggestions were most frequently made about improving passenger information, both in the event of disruption and as a preventative measure. There was a lot of

spontaneous interest across all demographic groups in the potential for technology to improve the information they receive – this included SMS, apps and smart signage.

In addition, participants proposed ideas related to:

- More passenger education and stricter/more consistent application of rules;
- Modification of processes that could create disruption;
- Increased target setting and monitoring;
- Faster response to problems and more contingency;
- More consistently applied 'soft compensation';
- Making the space more conducive to waiting; and
- Clearer information on compensation and making it easier to claim.

The appeal of a number of propositions was also tested, including:

- Reducing the number of flights at congested airports;
- Increasing or moving resources to improve resilience;
- Increasing 'block times' (the time scheduled between departure and arrival of flights) to provide more leeway; and
- Improving information provision (both in the event of disruption and more general information regarding on-time performance).

Improved information provision was, not surprisingly, the most popular, although general information regarding on-time performance had limited appeal. A number of participants could also see benefits from increasing or redeploying resources, although participants were polarised on whether they would be prepared to pay extra for this. Increasing block times was unpopular as it was not perceived to address the core problem and could be seen as misleading. Similarly, most rejected the prospect of reducing flights, as they would not be prepared to accept lower choice.

Overall, disruption was generally not seen to be big enough problem currently to warrant trade-offs of either reduced choice or increased prices associated with certain remedial measures suggested. Views on this may change should disruption be seen to worsen. However, consumers would first need to be convinced that what they are 'paying for' will be genuinely effective in improving resilience.

1.3   Conclusions

Consumers' perceptions and expectations with respect to journey disruption were largely consistent across all of the different types of airport users represented in this research. The general consensus was that disruption could take a number of different forms and that all of these have the potential to have deleterious impacts on

passengers. It was also generally understood that disruption could have a range of day-to-day causes and was not just related to signifcant adverse events.

While there was not seen to be a major problem with journey disruption currently at London airports, there was felt to be scope to make improvements in a number of areas, including:

- Ensuring efficient management of day-to-day airport processes on a consistent basis;

- Responding to pinch points and problems in a timely way, including by anticipating issues in advance wherever possible; and

- Providing good quality information and welfare to passengers in the event of disruption.

In addition, participants shared the view that it would be important to avoid any future increase in disruption given the expectation of growing capacity constraints and congestion.

Some views on disruption held by consumers applied to all airports and airlines. However, there were also some differences in perceptions of disruption at the four London airports of interest, with Luton and Gatwick subject to most criticism overall.

Improving passenger information was the number one priority of consumers and this was believed to have value both in the event of disruption and as a preventative measure. Benefits from increasing or redeploying resources were also seen, although participants were polarised on whether they would be prepared to pay extra for this. Any remedial measures involving a reduction in choice would be unacceptable to most consumers.

2. Introduction

2.1 Background

The Civil Aviation Authority (CAA) is the UK's independent aviation regulator and, across all of its remit, the CAA places the interests of consumers at the heart of its work.

The requirement for this research comes from both:

- The CAA's Price Control Review for Heathrow airport (H7)[3] which includes as one of its strategic themes the exploration of how to improve airport resilience in a capacity constrained environment; and

- The CAA's wider work on the operating resilience of UK's aviation infastructure, focusing on capacity constrained airports in the South East of England.[4]

This research has been commissioned by the CAA to update and expand its existing evidence in order to provide:

- A focus on consumers' views of *day-to-day* journey disruption, caused by runway and airport congestion, rather than disruption which is related to significant adverse events as well as the effectiveness of operational planning.

- A better understanding of *informed* consumer expectations and perceptions with respect to journey disruption, including once they have been exposed to materials explaining disruption and possible trade-offs to manage or reduce this.

- Specific intelligence on users of *four London airports:* Heathrow, Gatwick, Stansted and Luton.

The findings will be used to help the CAA develop evidence-based policies which reflect consumer views, and is intended to inform a further dialogue and action with the aviation industry on how to improve resilience.

2.2 Aims and focus of this research

This research has sought to explore fully consumers' perceptions of disruption, including:

- How broadly consumers define this term.

- How much of a concern current levels of disruption are to consumers.

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[3] https://www.caa.co.uk/Commercial-industry/Airports/Economic-regulation/Licensing-and-price-control/Heathrow-price-control-review-H7/
[4] https://consultations.caa.co.uk/policy-development/operating-resilience-of-uk-aviation-infrastructure/consult_view

- Whether improvements are perceived to be required, either in the reduction or management of disruption.

- What consumers' specific priorities are for reducing or managing disruption.

- How they view possible trade-offs to achieve improved resilience.

As mentioned above, the focus of this research was on users of Heathrow and Gatwick airports (which are both currently regulated by the CAA under an economic licence), as well as two other London/South East airports: Stansted and Luton.

2.3   Methodology

A qualitative approach was used for this research and the overall programme comprised of:

- 10 focus groups with a cross-section of local (London/South East-based) recent London airport users.

- 20 depth interviews with additional specific passenger types who recently used Heathrow (passengers with restricted mobility or PRM, international connecting passengers, domestic connecting passengers and foreign resident passengers).

This weighting towards Heathrow users reflects the fact that this airport is used by a significantly greater number of passengers than other airports in London and the South East. It also relates to the fact that the H7 Review's focus is on future regulatory arrangements at London Heathrow Airport.

The research was conducted between 16th August and 7th September, 2016 and, in total, 90 consumers took part (75 in the groups and 15 in the depth interviews). More detail on the sample design, recruitment and approach to the discussions is provided below.

2.3.1   Sample design

The group programme was designed to include a cross-section of consumers who had used one of four London airports within the past year. The groups were split as follows:

- 4 x 2 hour groups with Heathrow users.

- 6 x 2 hour groups with Gatwick, Stansted and Luton users (2 groups with users of each of these airports).

A range of socio-demographic characteristics (e.g. gender, age, ethnicity, socio-economic grade) and flying-related variables (e.g. frequent and non-frequent flyers,

business and leisure flyers, short and medium-long haul flyers) were represented across the group samples, as highlighted in Figure 1 over the page.

In addition, to ensure that this research would represent both the views of those who have been directly affected by disruption and those who have not, a quota was applied of passengers who had experienced some form of disruption in relation to their use of a specific London airport but this was not a requirement for all participants.

Figure 1

GROUP PROGRAMME (10 x 2 HOUR GROUPS)				
	Gatwick	**Luton**	**Stansted**	**Heathrow**
Frequent flyers (3+ times in last year)	Group 1	Group 3	Group 5	Group 7
Non-frequent flyers (<3 times in last year)	Group 2	Group 4	Group 6	Group 8
Used airport for Med-long haul flight (3-7hrs and >7 hrs)	N/A	N/A	N/A	Group 9
Used airport for short haul flight (up to 3 hrs)	N/A	N/A	N/A	Group 10
Additional quotas:	Each group included a mix of: • Gender (at least 3 x women, 3 x men). • Ages (at least 2 x under 30, 2 x 30-49, 2 x 50+). • SEG (at least 4 x ABC1). • Those who used the specific London airport for a business or leisure flight (at least 3 business flyers in frequent flyer groups). • *(Except for Groups 9 and 10)* Those who used the specific London airport for a short (<3 hours), medium (3-7 hrs) or long haul (>7 hrs) flight (at least 2 medium-long haul). At least 2 per group had incurred some form of disruption when using the specific London airport within the last year. However, a limit of 3 in FF groups and 2 in all other groups was imposed on those who have experienced a significant flight delay or cancellation specifically.			

The depth programme sought to represent a number of additional types of passengers who had used Heathrow recently:

- 5 x 1 hour face-to-face depth interviews with those who self-classify as being PRM.

- 15 x 45 minute tele-depth interviews, 5 each with international connecting passengers, domestic connecting passengers and foreign resident passengers.

More detail on the depth interview samples is provided in Figure 2 over the page.

Figure 2

F2F DEPTH PROGRAMME (5 X 60 MIN F2F DEPTHS)	
	Heathrow
Have a PHYSICAL disability, long-term health condition or significant mobility issue that makes it difficult to access/use airports	Depth 1 (sought airport assistance)
	Depth 2 (sought airport assistance)
	Depth 3
Have a NON-PHYSICAL disability or health condition that makes it difficult to access/use airports	Depth 4
	Depth 5
Additional quotas:	Broad demographic spread: - Gender (at least 2 x women, 2 x men). - Ages (at least 1 x under 30, 1 x 30-49, 1 x 50+). - SEG (at least 3 x ABC1).
TELE-DEPTH PROGRAMME (15 X 45 MIN TELE-DEPTHS)	
	Heathrow
Foreign residents	5 depths
International connecting passengers	5 depths

Domestic connecting passengers	5 depths

2.3.2 Recruitment and fieldwork

The participants for the groups and PRM depth interviews were free-found by our specialist recruitment partner, Criteria Research, using a screening questionnaire that we drafted to ensure all participants met our quota requirements. The group discussions were conducted by the Collaborate Research team in conference facilities in Central London (for Heathrow or Gatwick users) and St Albans (for users of Luton and Stansted). We conducted the PRM depth interviews in participants' homes in various locations across London and the South East.

The tele-depth participants were recruited by the CAA's research team airside at Heathrow in early August. This approach was taken in order to find participants who would be otherwise difficult to identify using standard recruitment procedures, particularly connecting passengers who may not have left the terminal. We then re-contacted participants to set up the interviews, which were conducted by telephone or Skype in their home country. We spoke to people in the following countries for this part of the research: Denmark, Dubai, India, Italy, New Zealand, Serbia, the UK and US.

2.3.3 Discussion approach

A 'deliberative-style' approach was taken in the research. This involved exposing participants to some facts on journey disruption, as well as ideas for reducing or managing disruption and the associated trade-offs, for their consideration. This material was introduced once an initial unprompted discussion of perceptions and expectations had already taken place so it would be possible to compare spontaneously held views with those that developed in response to the stimulus.

We drafted detailed discussion guides for the groups and depth interviews, and also prepared a stimulus pack of disruption-related facts and ideas based on data provided by the CAA. The discussion guides have been included in Appendix 1 and the stimulus slides are contained in Appendix 2.

A number of participants in the groups, and a few also in the depths, had recent experience of using more than one London airport. In these cases, their comparative views and experiences were also discussed.

While not all participants had experienced disruption in their recent use of a London airport, most had incurred journey disruption at some point in their air travel history. They drew on this in the discussions, however it should be noted that for some it was not recent or specifically related to a London airport. This report distinguishes views

expressed specifically in relation to London airports from those which were more generally held.

2.4 Structure and contents of this report

This report focuses on the main insights from this qualitative research and, as with any qualitative research study, the findings should be treated as being indicative rather than definitive.

The chapters to follow in this report have been structured as follows:

3. **Consumers' understanding of journey disruption***: How top-of-mind journey disruption is to consumers, how widely the term is defined, and what are believed to be the main causes.

4. **Perceived impacts of journey disruption:** What types and levels of impacts from disruption are perceived by consumers, whether certain groups are expected to be disproportionately affected, and whether participants have modified their own behaviour in response to disruption.

5. **Consumers' views on current levels of journey disruption at London airports:** The extent to there is perceived to be a problem with disruption at London airports, and how partcipants respond to seeing disruption-related statistics and information.

6. **Consumers' views on the current industry response to journey disruption:** Where responsibility is believed to fall for dealing with disruption, what participants expect industry to do to reduce or manage disruption and how they evaluate the current response.

7. **More detail on how disruption has affected different types of Heathrow users:** More detail on the disruption-related perceptions, expectations and experiences of different types of Heathrow users, including frequent flyers and non-frequent flyers, short haul and medium-long haul flyers, PRM, international connecting passengers, domestic connecting passengers and foreign resident passengers.

8. **Measures suggested by consumers to reduce and manage disruption:** Participants' own suggestions and their reactions to a number of ideas with associated trade-offs.

3. Consumers' understanding of journey disruption

3.1 Key findings

- Perhaps unsurprisingly, the extent to which journey disruption was top-of-mind to participants in relation to air travel depended on whether and how recently they had experienced a disruptive issue and how significant this was felt to be. Their extent of focus on disruption was also related to other factors such as how regularly and why they fly, and how they feel about flying. For example, regular flyers were more likely to have been affected by disruption but tended to be less concerned about disruptive events than infrequent flyers.

- Notwithstanding these differences, when the term 'disruption' was introduced in the discussions, participants shared a relatively wide definition of the types of issues that could disrupt or cause inconvenience in their journey. This went well beyond flight delays and cancellations to include a range of other disruptive events that could take place within airports, as well as with respect to surface access to airports.

- It was understood that both significant events and day-to-day factors could contribute to disruption. Participants were able to nominate a range of possible causes which included a number that were specifically related to capacity constraints (such as staff shortages or knock-on effects from earlier issues).

3.2 Consumers' focus on, and definition of, journey disruption

Not surprisingly, how closely participants associated disruption with London airports depended on whether and how recently they had experienced an issue there, and how significant this was felt to be. How top-of-mind journey disruption was in connection to flying generally related to factors such as how regularly and why consumers fly, and how they feel about flying. For example, frequent and business flyers were more likely to have been affected by journey disruption at some point previously but they may also be more sanguine about it than their less regular or leisure flyer counterparts. Those who described themselves as being 'nervous flyers' tended to be particularly exercised about journey disruption as this could result in them worrying more about their safety or security during their journey.

Despite these differences, when the term 'disruption' was introduced in the discussions, participants shared a relatively wide definition of the types of issues that could disrupt or cause inconvenience in their journey. This spanned such issues as:

- Problems with travel to and from the airport.

- Flight delays and cancellations.

- More 'indirect delays' such as taking too long to board the plane, on the tarmac before takeoff, or waiting to land or disembark.

- Long waits or queues at the airport, including at security, passport control, waiting for luggage, or even to receive refreshments at concessions.

- Long distances, insufficient signage, last minute notifications (e.g. of gate changes or boarding) or other difficulties in using airports.

- An unpleasant waiting environment (e.g. crowded, with limited seating, insufficient amenities etc.)

- Lost or damaged luggage.

The following selected verbatim comments highlight the breadth of consumers' understanding of what could constitute disruption to their journey:

"(Journey disruption) starts from the start, before you've even parked, or been dropped off! So that tailback of traffic." (Luton users, frequent flyers)

"I think its just wasted time whether it's delays, queuing or getting through security. Disruptions are a waste of time." (Gatwick users, frequent flyers)

"Security can be an absolute nightmare. You can miss the plane while you're queuing for the security quite easily. I've queued at security sometimes for over 3/4 of an hour. They say you need to arrive at the airport sort of 2 hours before, but really it should be 3 now, because of how long it takes." (Luton users, frequent flyers)

"When you start to walk and it's taken 10 minutes to go past 5 gates and you know you've got another 30 gates to go." (Gatwick users, non-frequent flyers)

"They change the gate as well. They've changed the gate before at the last minute and there was very little communication. I very nearly missed my flight which is really annoying because I looked up the gate, I knew where I was going, then I looked up again and they had changed it." (Stansted users, frequent flyers)

"At the larger airports the larger gates are comfy. At Luton you're at a stairwell and it's not air-conditioned, so if it's hot and because it's all glass-fronted, it's very hot…"(Luton users, frequent flyers)

"It's particularly bad if you're already on the plane with no air conditioning. Sitting waiting on the tarmac is not pleasant." (Heathrow user, foreign resident)

"My experience recently of any of them is that when you come back into the country the passport queues are ridiculous. Coming back into the country now you're knackered. You've travelled back, the excitement of your trip has gone and you have to stand in that line." (Heathrow users, non-frequent flyers)

"It's always coming back that you have to wait for your luggage and it's that wait. You can wait 10 minutes some days and you can wait an hour another day. It's all variable." (Heathrow users, frequent flyers)

"I know mates who have lost their suitcases and never got them back. I thought 'oh the rigmarole, you've got to try and think what clothes you bought, are you going to get all your money back for it?'" (Stansted users, frequent flyers)

3.3 Perceived causes of journey disruption

Participants instinctively understood that both significant events and day-to-day factors could contribute to disruption and they were able to nominate a number of specific possible causes:

- Adverse events such as bad weather, strikes etc.

- Passenger-created issues such as being late for boarding, disruptive or not knowing the correct procedures for security screening.

- Mechanical problems with the aircraft.

- Anti-terrorism measures causing security and passport control procedures to take longer.

- Insufficient staff or staff shortages, particularly at peak times of day or during holiday periods but also late at night or in the event of late arrival of aircraft.

- Missing takeoff or landing slots and generally busy runway schedules.

- Knock on effects from earlier issues at the airport or elsewhere e.g. late incoming flights or baggage not being loaded at origin.

Of all the possible factors, the possible causes that were most frequently mentioned by participants related to capacity constraints. Staff or resource shortages were regarded to be a common and visible cause of disruption, as evidenced by the following quotes:

"There are just never enough people anywhere. There are never enough people in security, passport control... I just feel like it's whenever you need someone, no one's around and the queues are just always big everywhere." (Heathrow users, frequent flyers)

"Just whenever there's a delay at Heathrow its because there are staff shortages I think. To me it looks like they've got all of this wonderful state of the art terminals, lovely shops and restaurants and the fact is there are not enough people to man it or cope with the volume of people." (Heathrow users, non-frequent flyers)

"The last flight I did was [with airline], the machines are automated and there were very limited staff round. The elderly get very confused by these machines and there was literally one woman running about 8 machines. She simply didn't have enough eyes, hands and feet to get round all the people who needed her assistance." (Gatwick users, frequent flyers)

"If they had enough staff on and enough equipment in order to deal with (people) quickly then they wouldn't have queues would they?" (Stansted users, non-frequent flyers)

The possibility of earlier disruptive events contributing to further disruption was also identified by a number of participants:

"I think airlines are very, very stretched in terms of planes, pilots…. One delay means that you're over your working hours, so they have to find another pilot, because they can't fly, you know? Everything has a knock on, it's like a domino effect, far more than in other businesses, I think." (Heathrow users, frequent flyers)

"There's a pipeline of different tasks which happen in order to make a flight go so smoothly. It could literally be the smallest thing that just has a ripple effect. For example, too many people phoning in sick one day and the whole thing's going to get delayed. Another flight due to come in which was delayed which will have a knock on effect to other people." (Heathrow users, medium-long haul flyers)

"The plane being late. I had it on the way out. It was late coming in so obviously then we were delayed. They have a very tight turnaround now. That seems to get worse towards the end of the day. The delays seem to trickle down until the last flights whereas it might be 20 minutes at a time if you're not flying until the evening that could be 3 hours difference by the time they've caught up." (Gatwick users, frequent flyers)

"If there's a delay on that at the beginning of the day it has a knock on effect. Sometimes that might not be caused by a delay at Gatwick, it's a delay earlier on in the day in France." (Gatwick users, frequent flyers)

The other main contributing factor, overall, was believed to be the actions of passengers themselves. This was nominated as a major reason for disruption and seen, especially by frequent flyers, as being particularly associated with inexperienced travellers.

"When you go through security I'd say 80% of the time it's slow, it's because like half the people haven't even travelled before. It's like you see everywhere it's a hundred mils and every time you see someone like 'oh I only just bought this, it's so expensive, please can I take it through?' …The queues would be half the size if people were actually prepped for it." (Heathrow users, frequent flyers)

"If you just generally don't understand how long it takes to do all the things that you have to go through, you might not generally leave yourself enough time, so that can cause problems can't it?" (Stansted users, non-frequent flyers)

4. Perceived impacts of journey disruption

4.1 Key findings

- There was a hierarchy of seriousness perceived among the types of disruption participants identified, with flight delays, cancellations and lost luggage believed to cause most ongoing inconvenience and potentially adverse impacts to passengers overall.

- However, it was felt that other disruptive issues within airports, such as long waits and queues, could also cause passengers irritation and stress, and detract from the overall travel experience.

- With flight delays, arriving late at the destination was perceived to have most impact as this could affect passengers' onward plans. However, a delayed departure time, whether or not this could be made up in flight, could also cause inconvenience, particularly if the passenger is confined to the aircraft or to an area in the airport that is crowded or has limited seating or facilities. This is because such waiting environments lack comfort and make it difficult for passengers to use their time productively.

- The degree of impact of a flight delay, cancellation or lost luggage was also believed to depend on the circumstances of the trip and particularly if there would be knock-on effects, such as to connecting flights or events, and associated consequential loss.

- Certain types of passengers, for whom air travel was believed to be more challenging generally, were expected to be particularly affected by any disruption. These included PRM, elderly flyers, those travelling with young children and nervous flyers.

- How participants used their time in the event of disruption depended to a large extent on how conducive their environment was to waiting and how much information had been provided to them.

- A number had modified their own flying behaviour to avoid or reduce the impacts of any potential disruption. These adaptations included allowing additional time, avoiding certain times of day and taking more or only hand luggage.

- Most did not spontaneously consider the impacts of disruption on the aviation industry or consumers generally. When prompted, participants identified that disruption could have a financial cost to industry but they did not make a further connection to the possibility of increased airfares.

4.2 Perceived impacts of different types of disruption

There was a hierarchy of seriousness perceived among the types of disruption participants identified. Overall, flight delays, cancellations and lost luggage were believed to cause passengers most ongoing inconvenience and potentially adverse impacts, including consequential financial loss and other knock-on effects (see Sections 4.3 and 4.4. for more detail on the perceived impacts of these forms of disruption).

> *"Most people are accepting of the fact that certain things, like passport control, are going to take time. Collecting your bags is going to take an amount of time but when you've lost a bag that's a nightmare.*" (Heathrow users, non-frequent flyers)

> *"Waits and queuing are like irritating and wear you down whereas cancellations and delays can ruin your holiday.*" (Heathrow users, short haul flyers)

> *"If your flight is cancelled then there is this helplessness. I think the same helplessness you have when your bag doesn't turn up."* (Gatwick users, frequent flyers)

> *"(With a lost bag you have) no clean underwear, no toothbrush, all of these things, and you might not be in a place where you can readily get them and that's going to start your holiday off really bad."* (Stansted users, frequent flyers)

However, it was felt that other disruptive issues within airports, such as long waits and queues, could also cause passengers irritation and stress, and detract from the overall travel experience.

> *"I might still have been in the airport for 2 hours but I've been in the airport for 2 hours getting stressed queuing rather than having cup of tea or beer, and sitting down and relaxing. That's a difference experience."* (Heathrow users, non-frequent flyers)

> *"It's kind of like you go there with the mindset 'oh good I've got an hour to walk round duty free and do some bits' and then you know you could be in the security for 40 minutes trying to get through and then you've only got like 10 minutes to run around and no time to chill out and relax before the flight."* (Heathrow users, short haul flyers)

In addition, participants perceived that delays in getting through airports could ultimately risk them missing their flight pre-departure or cause issues with their onward transport upon arrival.

> *"You can get delays at security and then you can see people start to panic. They think they're not going to get on to the flight on time."* (Heathrow users, medium-long haul flyers)

> *"It's quite a stressful experience nowadays with going through security and being alert of what you've got to do. I never relax until I'm actually on the plane and kind of go right I'm here everything's ok now."* (Heathrow users, short haul flyers)

"My gate came up. I watched it come up on the screen and straightaway it said gate closing. I rushed off the gate which was about a 25 minute walk by the time I got there they said 'sorry, you've missed the bus'." (Gatwick users, frequent flyers)

"I think another important point to mention is if the delay is potentially my delay, I get more stressed. So when I say my delay I mean the security queue and I could potentially miss my flight because of that, that's going to cost me money, but if I'm waiting for the gate and the flights are all delayed, that's the airline, that's not me." (Stansted users, frequent flyers)

With flight delays, arriving late at the destination was perceived to have most impact as this could affect the passengers' onward plans. However, a delayed departure time, whether or not this could be made up in flight, could also cause inconvenience and stress, particularly if the passenger is confined to the aircraft or if the airport they are waiting in is crowded or has limited seating or facilities at the gate (e.g. shops, Wi-Fi, power sockets etc.). One of the reasons for this is that these sorts of environments are uncomfortable and make it difficult or impossible for the passenger to make any sort of productive use of their waiting time.

"It depends where you are in the process when it gets delayed. If you're sat in the lounge having a drink in Wetherspoons then you're probably going to be less annoyed than if you're stuck on a plane on the runway and the air conditioning is not working." (Heathrow users, medium-long haul flyers)

"What's the most frustrating part for me for a delay is if they put you on the plane pretending they're going to go off on time. They know before that that you're not going to go off on time and they leave you on the plane in this position. If they know there's a delay, why can't they keep you in the terminal?" (Heathrow users, frequent flyers)

"Not moving and a lack of information drives me insane that they can't tell you what's happening. When you're waiting and sitting on a plane waiting to get off." (Heathrow users, non-frequent flyers)

"Yeah, it's worse when I'm sitting there ready to go, because it's quite confined and I don't like that, you know, there's not a lot of space and stuff and I just want to get it over and done with… I hate just being like trapped in and people not moving. It just really annoys me." (Gatwick users, non-frequent flyers)

"When you land and steps aren't ready to get off the plane, or the jetty's not ready and everybody stands there with their neck crooked up against the baggage things waiting to get off. And you're just desperate then to get off the flight at that stage." (Heathrow users, frequent flyers)

4.3 Perceived impacts on different types of journeys

One of the factors participants considered was whether delays would affect passengers making longer or shorter flights more. For short haul flights, the degree of impact of a delay was sometimes thought of as a proportion of overall flight length (e.g.

an extra 25% would not be seen to cause any significant impacts while an extra 50% would be regarded as too long relative to the length of the flight and likely to impact the trip given that the total time away was expected also to be relatively short in most cases). Overall, some were more accepting of a longer delay to a long haul flight, mainly because of the greater potential for making this up in flight. However, others felt that the impact of delays on long haul flyers would be greater given the overall length of the journey and likelihood that they would be tired and jet lagged upon arrival.

"I think it has less impact on longer haul, because if you're on the flight for 10 or 12 hours, a 2 hour delay in the great scheme of things isn't the end of the world, whereas if you're on a 40 minute flight, or an hour flight to Europe and you're delayed for 2 hours then that's a killer." (Stansted users, non-frequent flyers)

"I'd rather be delayed on short than long haul. You're on the flight for so long. If you fly to the States you tend to get there in the afternoon if you leave here in the morning. So if you are delayed you might get there at midnight and you've lost a whole day and you're tired. Short haul you recover quickly. You don't really get jet lag." (Heathrow users, medium-long haul flyers)

"I find that worse (on a long haul flight). You're going to be sat on that for 10 hours but you've been delayed at the airport for 3 or 4 and that just makes the whole thing so much longer." (Gatwick users, frequent flyers)

The degree of impact of a flight delay, cancellation or lost luggage was also believed to depend on the circumstances of the trip, for example:

- Who the passenger is travelling with and what their needs are.

- Whether there was a business meeting, other event or connecting flight that they risked missing.

- Whether the disruption created any financial cost (e.g. related to connecting flights, ground transport, hotel bookings, needing to buy replacement items etc.) or inconvenience to others (e.g. to a friend or family member who is waiting for them).

"It depends who you are with and what they're doing. If I'm sat on a plane waiting to go to Singapore with a glass of champagne in my hand I don't care. If I've got my son sat next to me on a plane on my way on holiday and they're saying there's a delay. We've got to sit here for an hour kids go crazy. They get bored and it stresses you out. If you're on your own I couldn't care less. It's different circumstances." (Heathrow users, medium-long haul flyers)

"If you're experiencing delays the impact is solely on how much time you have and on your circumstances to your booking. It's hard to say how's it going to impact. Everybody will have a different view." (Gatwick users, frequent flyers)

"People who've got connections it must be so stressful for those guys when they know they've got a tight connection." (Heathrow users, non-frequent flyers)

"It's misconnecting a flight. Often, you know, you can book flights separately because it's cheaper, so if you've got a connection it may not be with the same airline the same group. You've done it all yourself so if you miss that connection you've then got to pay and sort that out yourself." (Heathrow users, short haul flyers)

"It depends on what the knock on effect is. I suppose it doesn't matter if it's left late. Has it landed late? If it lands late I may well miss my meeting." (Luton users, non-frequent flyers)

"I was going to a meeting which I then missed. It was only, I think, a couple of hours delay but it obviously affected my entire day so that was a real issue for me." (Heathrow users, short haul flyers)

"If you go on an evening flight and get an hour or 2 hours delay, you get to the other end there's no guarantee about public transport so then you've got to fork out for a taxi." (Heathrow users, short haul flyers)

4.4   Perceived impacts on different types of passengers

Certain types of passengers, for whom air travel was believed to be more challenging generally, were expected to be particularly affected by any disruption. PRM and the elderly were highlighted as being disproportionately impacted for several potential reasons:

- Mobility restrictions could limit their ability to manage queues or get around the airport quickly in response to any time pressures caused by disruption.

"My mother's disabled and when we go on family holidays we have to allow an extra hour and a half just because you can't do that rushing, you can't shove a wheelchair through at twice the speed." (Heathrow users, frequent flyers)

"I can't stand around for very long it gets me very tired and out of breath, Also because I can't go through the metal detector, I always have to take my shoes off so they go through the scanner but then there needs to be a seat for me to sit down." (Heathrow user, PRM)

- Vision or hearing impairments could restrict their ability to see signage or hear announcements updating them on disruption.

"They're sort of flat boards and not very well lit. I feel the information can be misconstrued especially if you're older or you've got a disability and you're disorientated. There's nobody there by the boards so you're just having to rely on looking at the boards." (Heathrow user, PRM)

- Anxiety disorders could be exacerbated in crowds, queues or in the case of delays.

"Elderly, you know, travelling so sometimes they find it stressful enough flying and I know my dad used to find it really stressful flying so any delay to him would be a real concern." (Heathrow users, short haul flyers)

"I've travelled with my dad quite a lot and he has anxiety issues around crowds and always knows security is going to be a nightmare. So he's wound himself up before leaving. Then you go in there and it delivers on all of what his greatest fears were. It's a nightmare. (Luton users, non-frequent flyers)

- They may worry that, in the event of a delay, they will not receive ongoing assistance, limiting their ability to use toilets, get refreshments or take their medication on time.

"Well my father-in-law's diabetic and he has to have insulin every so often and he injects himself before he gets on the plane and if he's flying to the States, where if you're delayed, you have to keep it chilled. If it starts to get warm, it goes off and it doesn't work. So if he knows he's got 8 hours between that and the next injection, he's got his flight, he's okay." (Stansted users, frequent flyers)

"A lot of elderly and disabled people are on medication. Are they going to get it before they get on a plane, or whatever? Confusion, because they could get stressed and sometimes they got problems with eyesight, they can't see the new notices, or hearing announcements and that. Also sort of movement to get to the gates when the sign does eventually go up and are they going to get overlooked, you know, the disabled if they're in a wheelchair." (Luton users, frequent flyers)

"If there's a delay will my special assistance still be there? My plans have gone 3 hours out of the window are they going to find someone else?" (Heathrow user, PRM)

In addition, both parents with small children and nervous flyers were mentioned as being potentially disproportionately affected by journey disruption.

- Parents with small children:

"People with kids because obviously if you've got children you've got to worry about feeding them and their sleep times and all the other stuff that goes with it." (Heathrow users, short haul flyers)

"Parents with babies need to have enough to feed them if they're delayed by 5-6 hours they have to have provisions in their suitcase or hold. We also said about the frustration of kids having no entertainment…." (Luton users, non-frequent flyers)

"It's just trying to keep (children) entertained. I mean airports haven't got much for them to do, that's the problem, so by the time you've had a drink and something to eat, you're a bit stuck with what they can do, especially if they're under 6 or 7." (Stansted users, non-frequent flyers)

- Nervous flyers:

"I don't like the whole situation. I find it very stressful. I really don't like flying so any delay or if things don't go smoothly is so stressful to me." (Heathrow users, non-frequent flyers)

"Well for me, because I'm an anxious flyer, I don't particularly like flying, but it's a means to an end, you've got to do it. When they tell you there's a delay, but they don't tell you why, then your mind starts going, do you know what I mean? Like what's the delay about? Is it a technical thing, is it…? Yeah, because obviously if you're anxious you just want to get it over and done with and the longer you're sitting there, the more your mind's sort of churning over and stuff." (Gatwick users, non-frequent flyers)

4.5 Adapted behaviour to minimise impacts

How participants used their time in the event of disruption depended to a large extent on how conducive their environment was to waiting and how much information they had on when the issue was likely to be resolved. Being in a queue, or confined to a crowded gate lounge or aircraft, made it difficult for people to make productive use of their waiting time. Similarly, if it was unclear when the situation would be resolved, such as in the case of a delayed flight, passengers would normally feel they needed to be on 'stand by' to consult boards for any update. Some even reported being caught out when a boarding notification went up for a previously delayed flight meaning they had to rush to get to the gate in order to board in time.

"Basically it said plane delayed and then suddenly said the gate and then the gate was closing and I wasn't the only one with my wife running for the plane because the turnaround time is so quick because they get a slot, don't they, to take off." (Heathrow users, short haul flyers)

That said, a number of participants had modified their own flying behaviour to avoid or reduce the impacts of any potential disruption. Some of the adaptive behaviour reported included:

- Arriving at the airport well in advance of the scheduled departure time in case of queues to get through to security.

"I always try and make sure I go a silly amount of hours before. My flight might be checking in 2 hours before. I make sure I'm there an hour before that. You just don't know what's going to happen. It's better to be there and chill out." (Heathrow users, non-frequent flyers)

- Scheduling connecting flights and any requirements at the arrival destination with ample leeway in case of delays.

"I'd always factor in probably an hour's worth of delay before saying I'm going to get to my meeting, I'm going to get to my hotel, or whatever." (Heathrow users, frequent flyers)

- Taking hand luggage only to get through the airport more quickly.

"I never take checked luggage. I travel very light and I just take a backpack and that's it." (Gatwick users, non-frequent flyers)

- Placing 'emergency items' in hand luggage in case of lost baggage.

"Missing luggage - that has got to be one of the worst, that's the most infuriating thing for me and I get really anxious about it as well. That's probably why I pack so much in my hand luggage, because I'm so worried that well if it does get lost, I've got more in my hand luggage." (Stansted users, non-frequent flyers)

- Taking flights at certain times of day to avoid expected disruption.

"It depends on the time of day. If it's a really early flight, or a really late flight, then you probably should get fewer disruptions, whereas if it's the middle of the day or the first weekend of the school holidays, you kind of expect it's going to be a lot busier." (Gatwick users, frequent flyers)

On the other hand, there was no evidence of disruption fundamentally affecting passengers' perceptions of the aviation industry or flying, or that it has directly led to them altering their choice of airlines or airports. Participants reported having more significant airline and airport choice factors (e.g. price, schedules, convenience of airport access and airline brand loyalty), although the absence or presence of disruption could contribute to general impressions and preferences of airlines and/or airports.

4.6   Perceived impacts on the aviation industry and consumers generally

Most did not spontaneously consider the impacts of disruption on the aviation industry but, when asked about this, participants could identify some potential effects. The main expected impact of disruption for industry was additional costs, such as from fuel wastage, additional staff or overtime, and potential fines for not meeting targets.

"In a very expensive business when you miss your slot, it can cost the airline hundreds of thousands of pounds." (Heathrow users, frequent flyers)

"We had a delay and had to go back to refuel so that must just cost them more in fuel." (Heathrow users, short haul flyers)

"Yeah, and you know the airlines they get fined. It's in their interests to take off and land on time." (Stansted users, non-frequent flyers)

"I also don't know how cabin crew's wages are paid, whether they're paid for a flight or whether they're paid by the hour." (Heathrow users, short haul flyers)

In addition, a few also referred to the potential reputational damage to airlines in particular if they become known for regular disruption or poor management of disruption.

"If you have a reputation then that spreads amongst people, social media or word of mouth. It's going to put you off." (Heathrow users, non-frequent flyers)

Participants did not spontaneously make any further connection to costs of disruption potentially being passed back to consumers. When the moderator raised this possibility, most responded with resigned acceptance. This was in part due to a sense of fatalism, as it was felt that consumers have no choice in this. However, it also related to a perception that air travel costs are comparatively low at present meaning that affordability is not currently a major concern.

"I think everything now works like that. If you're losing money somewhere you've got to claw that money back. It's a business and ultimately the customer is the person who pays. Like our insurance premiums go up every year and that's just part and parcel of how it works. There is nothing you can do, there's a certain amount of apathy that creeps in." (Heathrow users, medium-long haul flyers)

"When you think about that, you've been delayed through potentially no fault of your own and now you're paying for that error on your next flight. But, then again, that's no different to the theft in supermarkets which they put it back onto the other goods in the supermarket you're paying for." (Heathrow users, short haul flyers)

"Even though it does impact on ticket prices, it's not like ticket prices are getting more and more expensive." (Luton users, frequent flyers)

5. Consumers' views on current levels of journey disruption at London airports

5.1 Key findings

- Overall, disruption at London airports was not spontaneously identified as representing a major, ongoing problem for passengers currently. This is partly because a certain level of journey disruption was regarded to be both inevitable and acceptable given the complexity of aviation – and this was factored into consumers' expectations and preparations. It also relates to a perception that air travel is more efficient than other types of public transport – for example, rail - and that the incorporation of more technology into the process is helping to increase its efficiency. As such, the prospect of being significantly affected by disruptive events was regarded as the exception rather than the rule.

- However, there was seen to be some room for improvement across all airports in the efficiency of day-to-day processes, response to problems and, particularly, the quality of information and welfare provided to passengers in the event of disruption.

- There were also some differences in how the four London airports were perceived with respect to disruption. Gatwick, Stansted and Luton were each felt to have relatively more budget carriers, short haul flights and inexperienced leisure passengers, compared to Heathrow. This meant that these airports were sometimes seen as being more susceptible to flight delays and other forms of disruption. In addition, disruption levels were linked to the perceived quality of the infrastructure and level of staffing at different London airports, with Luton and Gatwick subject to most criticisms on these aspects.

- When delay statistics were provided, a significant number of participants felt these to be lower than they expected and indicative of good performance. This was particularly the case for Heathrow, given its size, and also once briefed on the capacity constraints it operates under. On the other hand, Gatwick stood out for having comparatively poor performance and this fitted with some people's experience of using this airport. A number were also concerned to know that the incidence of delays is increasing in three of the four London airports explored in this research.

- Participants were very nervous about the possibility of airports and airspace getting busier in the future, causing not only more disruption but also more pressure on safety and security measures.

5.2 Views on disruption levels at London airports overall

A certain level of journey disruption was perceived to be inevitable given all the parties and processes involved in delivering air travel, as well as the volume of people flying. This was factored into consumers' expectations and tolerances; for example:

- Less than 30-45 minutes was generally not regarded as a significant flight delay and would not even be noticed by some consumers.

- Less than 20-30 minutes not regarded as a significant wait/queue length by most participants.

"I think what seems to be now inevitable are things like security queues. Taking off your shoes and your belts, that seems to be just normal." (Heathrow users, frequent flyers)

"I think most of the time if its less than half an hour (delay) I probably wouldn't even remember. It's just filtered in as part of the process…I always expect everything to be an extra half hour either way, give or take. It just seems to come with travelling." (Gatwick users, frequent flyers)

Despite this, air travel was generally regarded as being more efficient than other types of public transport, particularly train travel.

"Southern Rail at the moment, it's a nightmare. With the trains you've got to leave extra time because you don't know what's going to be going on." (Gatwick users, frequent flyers)

In addition, efficiency in getting through London airports was felt to have increased in some areas:

- Participants specifically mentioned check-in (given the encouragement of passengers to check in online), and where technology has been incorporated into airport processes (e.g. boarding card readers, passport readers), provided these are working reliably.

- Some people also mentioned consumer-facing technology such as apps to check current flight times and the ability with some airlines to present boarding passes on smartphones.

- In addition, some people believed that security screening is now faster than it was a few years ago, when new anti-terrorism measures were first introduced, as passengers have become more familiar with the requirements. However, others disagreed and felt that security queues were the same or worse then they had ever been.

"I do think its quicker getting through now and the fact that when you go in you can check in at home. You can check your flight, where it is. If you're waiting for the one to come in you can see if it's left on time just using apps. And then there's your

boarding pass on your phone. There's lots of little things that make it easier."
(Heathrow users, non-frequent flyers)

"I think a lot of stuff they've improved dramatically, you know, you can really see in security where they've got the queuing control and they're moving people. There's always someone on there so you know you can really see how they're trying to reduce it down, so you can see where they're really trying to make improvements. Also, now I know at T5 they've got a thing there which says how long the security queue is, so you know in your head how long it's going to take you to be there. And if there are issues I've seen the staff and they'll take people through and put them into a quicker queue or move them to the side, so I think they've got a lot more passenger friendly." (Heathrow users, short haul flyers)

"When I was last in Gatwick, this was coming from Venice, I remember getting through really quickly, but I remember thinking 'oh, my God (the automated passport readers) are going to be like self-service at Tesco's when they first came out, it's going to be a nightmare'. So I was really surprised." (Gatwick users, non-frequent flyers)

"I think whilst technology has got better, the airports have got busier and they haven't really got much bigger so, you know, if you're going to get more people going through then some parts might be quicker, some parts might take longer." (Gatwick users, non-frequent flyers)

As such, the prospect of being significantly affected by disruptive events at London airports was expected to be the exception rather than the rule.

For all of these reasons, disruption at London airports was not spontaneously perceived to represent a major, ongoing problem for passengers currently. All consumers, including frequent flyers, shared this view.

However, there was believed to be room for improvement across all airports in:

- Increasing the overall speed, efficiency and consistency of airport processes (as long as this is not at the expense of safety or security).

- Anticipating and responding to pinch points and problems where they occur.

- Informing passengers and minimising the inconvenience and impacts to them of the disruption.

"Consistency with actually getting through. Sometimes you turn up there and depending on which terminal you're going from and what time of day your flight is, if you're one of the morning flights it seems to be a bit better prepared than if you're going in the middle of the day." (Heathrow users, frequent flyers)

"I think the performance has increased but I think there's still things that could be done to make it a better customer experience. Like the security, the way you're treated at security, and passport control and the baggage. So just thinking about the whole customer experience where your delay pinpoints are, how do you make that easier for a customer." (Heathrow users, short haul flyers)

5.3 Views on disruption levels at different London airports

Views on disruption were largely consistently held by users of each of the four London airports of interest to this research. However, there were also some differences in how each of these airports was perceived.

Gatwick, Stansted and Luton were felt to have relatively more budget carriers, short haul flights and inexperienced leisure passengers, compared to Heathrow. This meant that these other airports were sometimes seen as being more susceptible to flight delays and other forms of disruption even though Heathrow was known to be London's largest and busiest airport. For example, budget airlines were commonly associated with having more delays than premium carriers due to tighter schedules, less contingency and less favourable arrangements with the airport on slot times.

"I've always been told it's to do with cost, that if you're going on a cheaper airline, they don't have as many slots as the more established ones." (Gatwick users, non-frequent flyers)

"So [airline] is cheap, so I fly with [them] a lot, it's normally got some sort of disruption, whereas if you fly with [another airline], or something, it seems to be a bit smoother. So in that sense I'd say it's probably the airline." (Stansted users, frequent flyers)

In addition, participants linked disruption levels to the quality of the infrastructure and level of staffing at different London airports. Luton and Gatwick were subject to most criticisms on these aspects.

More detail on participants' views of each of the four London airports is provided below.

5.3.1 Heathrow

Heathrow was regarded to be the flagship London airport in terms of the choice of airlines and destinations it offers. It was also generally perceived to be well-organised and efficiently run, particularly given the volume of passengers being processed.

"The checking in process at Heathrow is a lot more efficient than other airports. Peak times it's not so congested. Not horribly congested where there are queues for everything and you can't find a seat… It feels a bit spacier (sic). At other airports you can feel a bit claustrophobic at times, especially in queues." (Heathrow users, non-frequent flyers)

"It is widely known that (Heathrow) is always one of the busiest. But it is very well organised. There are so many different flights. It is a very connected place…I travel all over Europe and all over the US and I still think Heathrow is the best." (Heathrow user, foreign resident passenger)

"Signage was good and there were real life humans directing people to their flight connections." (Heathrow user, international connecting passenger)

"Our whole travel experience (at Heathrow) was actually really good… There were a lot of boards around and these were refreshed regularly. They let you know in plenty of time to get to the gate and they told you how long it would take. It didn't feel overwhelming at all…. They communicated very well what you needed to do and when you needed to do it." (Heathrow user, foreign resident passenger)

While some differences were identified between terminals, most found the physical environment at Heathrow to be spacious and pleasant, and the range of shops and facilities was also mentioned as a plus point, including in the event of disruption such as a delay.

"I think Heathrow's a lovely airport to fly from, despite the fact there's just so many people, but I think the fact it's divided into so many terminals makes it feel just nicer, more spread out, more spacious." (Luton users, non-frequent flyers)

"If you're going on holiday it feels like that's almost part of your holiday at Heathrow. Whereas if you're at some of the other airports it doesn't. You're almost like 'I've got to get past this bit before is start my holiday'." (Heathrow users, non-frequent flyers)

"It was quite lovely. It's quite large, obviously, and there's a lot of walking but this could be good on a stopover. It's pretty, clean and there are lots of things you can do, like shopping and places to go for a drink." (Heathrow user, foreign resident passenger)

"Lots of stuff in there to do, I suppose. When you're waiting if you get delayed, god forbid, but there's plenty of stuff to get on with, you can get your coffee, you can get your food, whatever you like; you can even do your shopping in there now." (Heathrow users, short haul flyers)

However, 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.

"The whole thing about multiple terminals means that before you actually even get there you've got to make sure you're on the ball, haven't you, so you don't make a mistake." (Heathrow users, short haul flyers)

Disruption was sometimes felt to be worse for incoming flights than outbound ones at Heathrow. This was with respect to landing or disembarkation delays as well as slow processing times at immigration and baggage retrieval.

"It's like all the effort's been put into saying goodbye to you but when you come back in they're kind of 'just get back in'. they don't care. You've had your holiday." (Heathrow users, non-frequent flyers)

5.3.2 Gatwick

Gatwick was seen by some to be quicker to get through than airports such as Heathrow due to its smaller size, However, others felt that the distances to walk to and from the gates could be lengthy at Gatwick.

> *"It's smaller and friendlier than Heathrow. When my kids have flown to places on their own it's much easier going through Gatwick. It's not so confusing. It's much quicker to get through as well."* (Gatwick users, frequent flyers)

> *"I suppose the only other thing is distance. Sometimes you do feel like you've walked to your destination by the time you actually get on a plane. I find that more at Gatwick. I don't know, maybe it's the airlines, but I feel like when I go there I walk really, really far. Whereas the other day Heathrow was really quick, it was quite pleasant."* (Heathrow users, frequent flyers)

Some Gatwick users associated this airport with crowding and queues. This was partly related to the budget airlines and leisure travellers using Gatwick. However, another contributing factor was believed to be that airport processing does always not keep up with passenger flows particularly during holiday periods but also at certain times of day, suggestive of insufficient resourcing.

> *"Going through security I find irritating, only because you see so many different scanners or X-Ray machines not being used. That's when it gets a bit frustrating."* (Gatwick users, frequent flyers)

> *"It seems if the flights get in late into the evening there's a lot less staff. You think if you landed at that time of night you should get through quite quickly but because the levels of staff aren't as high it can end up being really slow."* (Gatwick users, frequent flyers)

The current upgrading within Gatwick has made it feel a less pleasant and easy to navigate environment to some users.

> *"It always looks a mess. Often it's the first or last sight you see. You think 'I'm happy to go on holiday now because of that'. It's been an organic process for the last 15 years and they just have never got round to because of the constant usage there's never chance to close down anywhere to get it finished."* (Gatwick users, frequent flyers)

5.3.3 Stansted

Stansted users said that they like the modern terminal building and facilities. The comparatively small size of Stansted compared to some other London airports also meant that it was felt to be comparatively quick and easy to get around.

> *"Yeah, I just prefer a smaller airport, like Stansted, rather than Gatwick and Heathrow really. It's the plane getting back from the runway to the stand, or from the stand to the runway - if you're at Heathrow, that seems to take half hour,*

whereas with Stansted you are within sort of 10/15 minutes." (Stansted users, non-frequent flyers)

"Stansted I think is better because you tend to have at least a shop, or somewhere you can buy a bottle of water, or something. Whereas I've been to other places and you're literally sat on the carpet with a machine that doesn't work and you can't even get a drink, which is really frustrating, especially if you're got little ones with you. So I think Stansted does that a bit better as you're not in no man's land when you get to the gate." (Stansted users, frequent flyers)

Passenger processing was generally felt to be efficiently managed at Stansted. The incorporation of technology (e.g. digital passport and boarding pass readers) was specifically mentioned as working well and contributing to this efficiency. There were also positive comments made about the role of staff within the airport.

"I think Stansted security have got it right, because you've got the guy pushing you through the lanes, he's telling you to get your liquids out, get your I-Pads out, all your bits and pieces. And so whilst there is a queue, it does move quite steadily and he's got you prepped before you go and get your tray and put your stuff in." (Stansted users, non-frequent flyers)

However, the light rail system to take passengers from the departure lounge to the gate reportedly can cause delays at busy times.

"That train was annoying this time I went on holiday. It came in, you had to get the train and we couldn't get on it." (Stansted users, frequent flyers)

5.3.4 Luton

Luton users referred to a number of factors at this airport that could cause day-to-day disruption although some nonetheless preferred to use Luton because it was closest to, or easiest to access from, where they live.

A number of specific disruptive issues related to Luton were identified, including with:

- Travel to the airport (because of delays caused by road works).

"I'm going from Luton again in September and this one's more of a package holiday. They've emailed me to say add an extra hour to your journey, because of road works going on." (Luton users, frequent flyers)

- Issues with parking (perceived difficulty travelling from the car park to the terminal) and pick-up/drop-off (bottlenecks caused by needing to pay £3 in cash to access this area).

"If my family wants to drop me off, everywhere charges you now. If you haven't got coins, if you don't know that, you're completely stuck." (Luton users, frequent flyers)

- Entry to the terminal building (dual entry/exit creating crowds and blockages).

"There's only really sort of one entrance, isn't there, and that's the in and out really, isn't it? So you're colliding with people, who are coming out, arriving with your bags and they've got their bags." (Luton users, frequent flyers)

- Security (needing to pay for plastic bags causing delays and insufficient queue management and support of passengers to get ready for screening).

"I had to pay for a plastic bag. We both needed a bag but I didn't have any change. It had to be £1 coin, then I had to go to the shop to buy something to change my cash. They wouldn't just change the cash up for you." (Luton users, non-frequent flyers)

- Boarding (last minute gate switching and queuing on the tarmac).

"Sometimes I get a plane that takes off at 7 in the morning and it's pouring with rain, they haven't got a walkway to go on the plane.... You've got to walk up the stairs and walk out in the rain and stand in a queue." (Luton users, frequent flyers)

All of these issues contributed to a perception that Luton could be more efficiently managed, although the passenger profile at this airport was also felt to be a major contributing factor.

On the other hand, Luton users felt that the small size of this airport is a plus point as this means that taxiing from the stand to the runway and vice versa doesn't take too long and that there are fewer passengers to process.

"It's not the massive walk from the shops to your gate. Yeah, so the distance from the departure lounge to the gate. You're not looking at whether it's going 20 minutes/25 minutes. You know it's a 5 to 10 minute walk." (Luton users, frequent flyers)

Participants hoped that the redevelopment of Luton would lead to improvements in the areas identified rather than being primarily focused on commercial aspects such as the retail concessions.

"There appears to be a lot of construction work going on recently. Lots of hoarding and they changed various entrances when you're used to coming out of a certain one. The area where everyone usually stands to greet people looked a bit different last time I came out, like it had been moved and the door was different. I found that really disorientating but whenever I see there's construction I kind of hope its going to be for the betterment." (Luton users, non-frequent flyers)

5.4   Response to facts provided on levels of disruption

Participants were briefed that:

- According to CAA data, the average length of delay across all flights (both delayed and not delayed) in 2015 was 15 minutes at each of the four London airports of interest, however this rose to 30 minutes among those flights delayed by at least 5 minutes and was considerably longer than average over

the summer, particularly at Gatwick.

- Across 2015, the proportion of flights delayed by more than 15 minutes was:

    o 24% at Heathrow (affecting circa 18m passengers).

    o 31% at Gatwick (affecting circa 12.5m passengers).

    o 21% at Stansted (affecting circa 4.7m passengers).

    o 27% at Luton (affecting circa 3.3m passengers).

- Both the level of delays and their length have been increasing over time at Luton, Stansted and especially Gatwick. By contrast, Heathrow has recorded stable levels and length of delays between 2012 and 2015.

When these statistics had been considered, a number of participants felt that both the incidence and length of delays were lower than they expected and indicative of good performance. This was particularly the case for Heathrow, given its size, and also once briefed on the capacity constraints it operates under (i.e. that it is subject to a cap on its number of flights per year and its runways are already operating at 98% capacity).

"98% capacity tells you quite a lot. Any business that's running at 98% capacity where human lives are at stake and you've got massive pieces of machinery flying into the air, I think is pretty good, to be honest with you." (Heathrow users, frequent flyers)

"I think that stat, about between 2012 and 2015 Heathrow in comparison to other airports have kept their rates of delay steady, I think that's really impressive and the scale of the operation, I've got quite a lot of tolerance for problems so I think it's fairly impressive." (Heathrow users, short haul flyers)

On the other hand, Gatwick stood out for having comparatively poor performance with respect to flight delays based on the statistics provided, and this fitted with some people's experience of using this airport.

A number were also concerned that the incidence of delays is increasing in three of the four London airports explored in this research.

In addition, these statistics raised additional questions for some consumers, such as how much impact these delays had on ultimate arrival times, how they break down by reason for the delay or what the range of delay lengths are that contribute to the average.

There were further concerns expressed once participants had been provided supplementary information on the capacity constraints and increasing congestion being faced at London airports. They were briefed that:

- It is forecast that airspace will become more congested over the coming years in response to increasing demand/passenger growth and no decision has as

- yet been made about an additional runway.

- Heathrow airport is subject to a cap on its number of flights per year and is already operating at 98% capacity.

- Other London airports are still growing their number of flights and having to deal with the impacts of increasing congestion.

Participants were very nervous about the possibility of airports and airspace getting busier in the future, causing not only more disruption but also more pressure on safety and security measures. They felt it to be critical that any temptation for airports and airlines to 'cut corners' be resisted, even if this is for efficiency reasons.

"Yeah, you sort of worry (when seeing the facts about congestion and capacity constraints). You think 'how many more flights can you seriously put on in a day?' There are planes taking off every 30 seconds and that's just in the UK. How can they put more planes in the sky? I don't get it. It worries me that they'll cut corners." (Luton users, frequent flyers)

"What is it, every 30 seconds a plane lands isn't it, or something like that? They had a leaked thing a few years ago didn't they, when there were so many near misses. It's actually quite scary." (Stansted users, frequent flyers)

"That's what occurs to me though, why would you leave a tiny margin of 2% capacity? That doesn't sound safe. To me, it sounds like the airport is just being greedy. They keep taking flights, flights, flights, but then what about the passenger safety? They have a responsibility to say actually no, we can't deal with any more flights, or there should be another airport built." (Stansted users, frequent flyers)

6. Consumers' views on the current industry response to journey disruption

6.1 Key findings

- Participants felt that certain types and causes of disruption were more acceptable than others. They were most likely to tolerate issues related to adverse events that were believed to be beyond the control of airlines or airports, as well as delays in order to fix mechanical problems and ensure the safety of passengers. Conversely, 'unnecessary disruption', especially if this was associated with perceived insufficient resourcing, planning or contingency measures, was the most irritating.

- A number of parties were perceived to share responsibility for minimising and managing disruption, with both airlines and airports believed to play an important role. It was believed to be sometimes difficult for consumers to ascribe responsibility for disruption so it was seen as critical that there would be good behind the scenes collaboration and no buck-passing of blame.

- A key priority for consumers in the event of disruption is to be informed promptly and effectively. Participants were highly critical of how passengers are currently informed, particularly in the event of flight delays. This criticism was levied on all airlines and airports, and was not confined to those operating out of London.

- Without adequate information, passengers could feel 'in limbo', and unable to relax, prepare themselves for the flight or do anything productive during the wait period. The absence of a credible explanation of the reason for a delay could also cause passengers considerable stress and anxiety, including about the safety of the aircraft.

6.2 Where responsibility is believed to lie for managing and reducing disruption

Participants generally felt that certain types and causes of disruption were more acceptable than others. They were most likely to tolerate issues related to adverse events that were believed to be beyond the control of airlines or airports, as well as delays in order to fix mechanical problems and ensure the safety of passengers. Conversely, 'unnecessary disruption', especially if this was associated with perceived insufficient resourcing, planning or contingency measures, was the most irritating. A visible example of this was having long queues at security or passport control when not all screeners or booths were open or where it was felt that not enough staff were

available to process people. It was generally felt that airports should be able to predict and respond to peak passenger influxes.

"It's more forgivable when it's an external, one-off incident. So if it's the weather, you can see it's foggy. If you know there's a strike somewhere you can't change that. There's a volcano eruption. But when it's day-to-day management that's something that can be improved and it's within their control so you're less forgiving on that front." (Gatwick users, frequent flyers)

"With delays the most important factor is safety, whether it's security, or mechanical. I mean we all put up with delays to make sure of that." (Heathrow users, frequent flyers)

"Yeah, so a safety impact and technical issues, obviously you'd rather it be fixed than to take off. If it's a passenger issue, it's frustrating, but in terms of who's to blame, I assume it's most likely to be the passengers, rather than any of the airline operators." (Gatwick users, non-frequent flyers)

"I think you accept when you fly on a plane you might get a technical delay and you kind of accept that because you want the plane to be fully fit. When you think they're just cutting corners here because they haven't got enough staff, whether it be at passport control, baggage, whatever the case may be, that's where you start to feel a bit short-changed." (Heathrow users, non-frequent flyers)

"Staff shortage is unacceptable. Nine times out of ten you've booked that flight months in advance. The airport knows it's open, the plane knows it's going. The bags have to get on. The bags have to get off. If there is somebody who's not there, granted there's illness, but there should definitely be capacity to pick that up. There is in every other job, staff gets dealt with. It's not acceptable in air transport. It's not acceptable on trains, or anything else. It's just a weak excuse." (Heathrow users, frequent flyer*s)*

"I think you'd feel more aggrieved about if it was something like staff shortage rather than system failure or technical issue with the plane. Something that was within someone's control to have fixed. Staff shortages seem a bit too easy. It's the same as the Southern Rail thing. Staff shortages seem inexcusable." (Gatwick users, frequent flyers)

"I mean I tend to get annoyed if say there's a long queue at passport control and there's a lot of places for people to go through but there's hardly anybody manning them. It's like if you go into a bank or something and you've got say 10 tills and there's one person serving." (Heathrow user, PRM)

A number of parties were perceived to share responsibility for minimising and managing disruption. Overall, airlines were seen as mainly accountable for flight delays, while airport authorities were held primarily responsible for issues within airports, including queues and baggage delays. This was in part due to a lack of awareness that airlines and not airports contract ground staff such as baggage handlers. As mentioned, it was sometimes felt that premium airlines are better than

their 'budget' counterparts both in minimising disruption (e.g. by having more contingency) and in managing it (e.g. by providing better information).

However, as the airline is the face of the travelling experience and the entity passengers pay for their travel, participants said that they would be most likely to complain to the airline about disruption even if it is not necessarily their 'fault'.

> *"You tend to approach the airline. The people behind the desk who are working for the airline. You do tend to go up to the desk and your flight and actually it's probably not their fault."* (Luton users, non-frequent flyers)

> *"I think it's the airline you pay as well. You book your flights with them and they're operating out of the airport. That would make them responsible."* (Gatwick users, frequent flyers)

> *"I think it's just an expectation that when you book something, it's a contract isn't it? If that airline's telling me I'm going to arrive in this city at this time then I don't care what they do behind the scenes to do it, just so long as they make it happen."* (Luton users, non-frequent flyers)

It was seen as sometimes difficult to ascribe actual responsibility for disruption as it was acknowledged that there are a lot of organisations and processes involved with delivering air travel.

> *"I think it's difficult to blame anyone, because there's so many people involved in this chain that, you know, if one thing goes, you know, I think it's difficult to blame anyone in particular."* (Stansted users, non-frequent flyers)

> *"It is a complicated machine. There is not a specific person or organisation to blame."* (Heathrow user, international connecting passenger)

> *"We live in a world of high capacity travel. These things do happen. I think it's much more structural issues beyond anyone's control than any one person being to blame. I'm sure every agency involved in ferrying people around the world take as a priority efficiency."* (Heathrow user, international connecting passenger)

> *"It's not one individual's fault. Sometimes it's a cumulative affect and it just gets worse and worse."* (Heathrow users, non-frequent flyers)

Given this, it was believed to be important that all of the parties involved in delivering air travel work collaboratively behind the scenes to minimise any disruption to passengers and that there is no buck-passing of blame.

> *"It's sometimes hard to know whether it's the airline or the airport authorities. I suspect that the airlines probably take the opportunity to blame the airport authorities and the other way round. Baggage handlers I'm assuming they are employed by the airport authorities not by an individual airline."* (Heathrow users, medium-long haul flyers)

> *"It's the blame culture though with airlines. This is what's frustrating, because there are so many parties involved that immediately they just blame somebody else,*

blame the bag-handlers, blame somebody who didn't turn up on time." (Heathrow users, frequent flyers)

"For me, it's irrelevant who's to blame, you know, the point is I'm going to be late, so whoever you tell me is responsible, whatever the reason is, I'm still going to be late." (Gatwick users, non-frequent flyers)

In addition, passengers were themselves perceived to share responsibility by behaving in such a way that does not contribute to disruption and by allowing sufficient time to deal with any issues that may crop up when using airports and travelling by air.

"It's your responsibility to check those boards. There are enough boards around." (Luton users, non-frequent flyers)

"Passengers are responsible for themselves. There are rules. It's your responsibility to look at the board and get yourself where you need to go. It's annoying sitting on the plane and still waiting for someone who's late." (Heathrow user, foreign resident passenger)

6.3   Consumers' priorities for disruption management

Perhaps the most important priority for consumers in the event of disruption is that they are informed promptly and effectively.

"They need to say why there's a delay so at least you know the reason as opposed to sitting on a plane with no idea what's going on." (Heathrow user, foreign resident passenger)

"Being kept in the loop is really important. The worse thing is standing in front of the board and just seeing it's been delayed with no other information." (Heathrow user, domestic connecting passenger)

"Sometimes if you can sort of paint a picture why it's delayed, then it's probably a bit more bearable. Because it gives you an understanding." (Gatwick users, non-frequent flyers)

"There will always be things that crop up beyond their control. The majority of people will accept this as long as they're informed." (Heathrow user, foreign resident passenger)

One of the reasons information is regarded as important is that it helps passengers to self-manage the issues and minimise the impacts.

"It's like when you're on the phone and you're in a queue, if they just keep saying 'we know you are waiting, we will be with you', it's so irritating, but if they say 'you're in queue position 6, you're now in queue position 5', then you know what to expect. You can plan for that, you know. That is all people kind of want really." (Stansted users, frequent flyers)

"The number one (priority) is information, even if the information is bad news. You need it to work out what you need to do, such as contacting someone at the other

end. It needs to be honest information and you need to be regularly updated." (Heathrow user, international connecting passenger)

"Pushing out information will reduce the need for people to queue to ask at information desks." (Heathrow user, domestic connecting passenger)

In addition to this practical benefit, information provision also helps to allay any concerns or anxieties that passengers may have as a result of the disruption and, in conjunction with welfare arrangements, it serves to demonstrates good customer care on the part of airlines and airports.

"Just so you know what's going on. You can't control it either way. There's nothing you can do when you're sat in the terminal but for you to say 'okay the flight was half an hour late coming in, that happens, or there is something wrong with the plane. I'm glad they're fixing that'. Having no information at all is more frustrating. It's more just peace of mind so you know you're not being fed some rubbish. At least you've been given a reason. I think sometimes you get that once you get on the plane, they tend to give you a reason but it would be nice to have that while you're sat in a terminal." (Gatwick users, frequent flyers)

"Communication is for peace of mind, so just something there saying 'your luggage will be with you in 10 minutes', then people ain't just looking at this black hole, thinking is it coming through yet?" (Stansted users, frequent flyers)

"An informed passenger is a happy passenger. When they don't know things they can get anxious and panicked." (Heathrow user, domestic connecting passenger)

"When they update you they actually care and I think that's the fundamental thing, just keeping everyone in the know." (Heathrow users, frequent flyers)

6.4 Consumers' views on the quality of information and welfare they receive

What participants particularly appreciated, on the occasions they experienced it, included:

- Texts from the airline alerting them of a delay or flight cancellation, ideally before they had left for the airport.

- Smart signage that provides information on timings e.g. expected queue time/fastest queue or walk times to gates.

- Clear and early instructions of what will be required from passengers in security screening.

- Being told the reasons for a flight delay and getting regular updates on when it is expected that the issue will be resolved.

However, there was considerable criticism of how passengers are informed, particularly in the event of a flight delay. There was a feeling that information provision is currently inconsistent and passengers are often kept in the dark.

"I've had my flight delayed at Heathrow with no explanation to as to what was going on. It was delayed about 40 minutes. It just kept saying the gate's due to open at this time but it was gone past the time." (Heathrow users, non-frequent flyers)

"Sometimes I get more information by looking it up on the internet, my flight information I just Google it when I'm at the airport. I usually get a bit more information." (Heathrow users, medium-long haul flyers)

"We've had to circle in the air and the communication was really poor. They didn't quite tell us why we were delayed they didn't really keep us updated on when we were in position to land. I had someone collecting me so it was delaying that process and I think it was only for like a 2 hour flight so then it was like you're in the air for much longer." (Heathrow users, short haul flyers)

Poor information provision was sometimes felt to be a consequence of airlines, in particular, not wanting to admit responsibility and open themselves up to compensation claims. Another contributing factor was believed to be a lack of communication between different parties operating within airports, meaning that flight and cabin crews, for example, were not always made aware of reasons for delays.

"That's quite a challenge for the airlines though, isn't it, because they're potentially admitting culpability for the delay. They may want to pussy foot around some of the delays because it is compensation, so whether they would be very open I doubt." (Heathrow users, short haul flyers)

"I think the reason they probably wouldn't tell you that is because it gives you someone you can blame. It's made really complicated so you wouldn't know who or what you can claim compensation for and who from, the more confusing it is the less likely you are to do it. If they say 'sorry, we didn't get enough staff in today' then you know exactly whose fault it is really." (Gatwick users, frequent flyers)

"It just shows you that the airlines are responsible for the information provision, but if they're not given the information by the air traffic control, or the operators, or whoever else, then they can't give you the information. So the communication between all of them needs to be a lot better." (Stansted users, non-frequent flyers)

As a result of insufficient information, passengers could feel 'in limbo', and unable to relax, prepare themselves for the flight or do anything productive during the wait period. The absence of credible explanation of the reason for a delay cannot be underestimated as not knowing why they were being delayed could cause passengers considerable stress and anxiety, including about the safety of the aircraft. This is particularly the case for less regular and more inexperienced flyers.

"It would have made a big difference because I could have gone 'right, it's going to be another 45 minutes, I've got time to get myself a drink' or 'I might as well walk

around for a bit and have a look' rather than sitting there waiting and looking at the screen." (Heathrow users, non-frequent flyers)

"When you're not filled in with knowledge of how long you might have to expect to wait then it just really stresses you out. For me, steam will start coming out of my head if I don't know when my flight's due." (Heathrow users, non-frequent flyers)

"When you don't find out the information in enough time to do something about it or have prepared yourself for it." (Luton users, non-frequent flyers)

"When you're having to wait sort of 1 to 3 hours, you're not told the reasons why, or when it's going to be resolved. That's really frustrating for me. I think a little bit more information probably would put a few people at ease." (Stansted users, non-frequent flyers)

"They said there was a problem with the plane, but didn't specify what the problem was, so I got quite freaky (sic)." (Stansted users, non-frequent flyers)

"It makes it much easier to sit there and be patient when you know what's going on. Otherwise you tend to wonder if there's something wrong with the plane. It leaves your mind open to so many possibilities." (Heathrow user, foreign resident passenger)

"I always sit and wonder, because I don't fly a lot, why is there a delay? Is it because the next plane has something wrong with it? That causes stress for me. I'm thinking the worst. I think that lack of communication sometimes can make a situation worse. It just builds up the anxiety of someone who suffers with it." (Heathrow user, PRM)

Participants also felt that there can be a lack of consistency in passenger welfare arrangements, such as providing vouchers, in the case of delays, and that compensation entitlements were often insufficiently explained.

"I was flying back from Barcelona a couple of years ago and we were diverted. We'd left from Gatwick, diverted back to Luton, so the car was back at Gatwick. They didn't put a bus on and wouldn't give you any vouchers, or anything, so you didn't have to pay more for the car park." (Gatwick users, non-frequent flyers)

"We were the last flight, or second to last flight, in the evening (and the flight was cancelled). The queues built up for customer service, it was about 10/11 o'clock and some people were saying 'oh you can get a hotel, because the next flights aren't going to be until 6/7 o'clock the next day and they're going to be full anyway'. Then all the [airline] staff like at midnight they just disappeared. We just slept in the airport because we didn't want to go and pick up a big hotel bill. There was no clear communication about whether you could book a hotel and claim it back. The next day they were saying 'oh yeah, you could have done that', but the night before they were umming and arring, so it was bit 'well, what do you do?'" (Gatwick users, non-frequent flyers)

These views on delay handling were not just held in relation to London airports and the airlines operating out of them, but were felt to apply to all airports and airlines. It is difficult to ascertain whether London airports were felt to be significantly better or worse than other airports in this area as relatively few had experienced a significant delay or flight cancellation at a London airport within the last year.

7. More detail on how disruption has affected Heathrow users

7.1 Key findings

- The additional groups and depth interviews undertaken with Heathrow users as part of this research enables more detail to be provided on how disruption has affected different passenger types who recently used this airport.

- Heathrow was generally perceived to be well managed in terms of passenger processing. It was also judged to have generally acceptable performance specifically in terms of the level of disruption it experiences and how it handles this.

- On the other hand, it was also felt that Heathrow could be daunting and challenging to navigate for first time users or inexperienced flyers due to its size, number of terminals and volume of users.

- A number of Heathrow users involved in this research had no particular experience of disruption there. Of those who had incurred disruption recently, there were some positive reports of how this was handled at Heathrow. However, there were also some less satisfactory experiences which suggest room for improvement in the management of arrival-related disruption as well as responding to the particular needs of PRM, connecting passengers and less experienced airport users (such as foreign residents) to minimise the impacts of disruption.

7.2 London/South East-based Heathrow users

As outlined previously (in Section 5.3.1), Heathrow was generally perceived to be well managed in terms of passenger processing. In addition, it was judged as having acceptable performance in terms of the level of disruption it experiences and how it handles this.

Some passengers felt that Heathrow compares favourably to other London airports with respect to its disruption levels and how it manages disruptive events. However, was also some acknowledgement that Heathrow is different to other airports (in terms of its size, passenger profile and types of flights) so not necessarily directly comparable.

While the physical environment and facilities at Heathrow were generally regarded favourably, it was also felt that Heathrow could be daunting and challenging to navigate for newer users due to its size, number of terminals and volume of users.

All of these general views about Heathrow were shared both by consumers who are frequent and less regular flyers, and those making medium-long haul as well as short haul flights.

Of those locally-based users who had incurred disruption at Heathrow recently, there was some positive feedback on how this was handled by the airport, including helping someone whose luggage was lost and prioritising a passenger through security who was close to his flight boarding time.

> *"I've had my baggage lost from Heathrow and the service was amazing. They were very quick at taking my details down and my bag arrived at home the next day when they found it…That was a after a big holiday, so I was chuffed to bits when they said 'look, we do know where your baggage is, it didn't make the flight, we were fully aware where it is and we'll get it back to you'."* (Heathrow users, frequent flyers)

> *"If you say I am close to missing this flight, they are very good at scooting you through (security) very quickly."* (Heathrow users, non-frequent flyers)

However, there were a number of reports of incurring significant arrival-related disruption at Heathrow (related to landing, disembarkation, passport control and baggage reclaim). This included one participant who reported an extreme experience where it took more than one hour for passengers on his flight to be offloaded after landing and there was also a significant delay in them receiving luggage:

> *"There's never been any downsides using (Heathrow) leaving the country. I always have the downside coming back into it. Like circling for hours on end when you're in a queue. I've had a terrible experience having to wait on the tarmac when we've landed for 1.5 hours because they couldn't get steps to the aircraft and this was at T5…We landed and it was all fine and when we got there we got sent to another stand. They couldn't get people to come and sort out the air bridge we needed to get off the plane and we sat there for 1.5 hours. Then they eventually had to bring manual steps and when we eventually got off there was nowhere telling us any information about the luggage. Finally we saw someone who said if you want your luggage you're going to have to wait between 3 or 4 hours for your luggage once you got off. So they took everybody's details and they sent the luggage on 2 days later."* (Heathrow users, non-frequent flyers)

7.3   Other specific types of Heathrow users

A number of specific types of users of Heathrow airport were additionally represented in this research, including PRM, those making international or domestic connecting flights, and foreign residents passengers. Their inclusion enables insights to be provided on the perceptions, experiences and expectations of these other Heathrow users with respect to journey disruption.

7.3.1 PRM

By definition, it is more difficult for PRM than other passengers to access and use airports, and to travel by air. In the case of the PRM who took part in this research, access barriers were sometimes not just related to mobility restrictions but also to other physical and non-physical impediments such as difficulty standing, vision impairments, difficulty comprehending information, a lack of stamina, anxiety, or the need to take medication, eat or drink, or use toilets at specific times or urgently etc.

As such, disruption is likely to have a disproportionate effect on PRM as it can exacerbate their conditions. This applies to all forms of disruption including long queues, crowded spaces, long distances to travel within the airport, lack of seating, insufficient amenities, and long waits due to flight delays or cancellations.

Where airport assistance has been requested and provided, the passenger will be helped to get through the airport and on/off the plane. However, this could also mean that the passenger would be less self-sufficient, such as in the event of a delay in getting them on or off the aircraft. In addition, not all PRM routinely notify airlines and airports of their condition in order to access assistance; in these cases they may be self-managing without necessarily having any external support and in some cases their conditions were not obvious to others.

Some PRM participants in this research had not incurred any particular problems with disruption using Heathrow in the past year but there were others who did report issues:

- One woman with mobility restrictions and vision impairments reported that she needed to walk a considerable distance to present at the assistance desk but, when she arrived there, no staff were present. Because of this, she and her son decided to go it alone in getting through the airport which made her very tired. There was also a 25 minute delay in getting her disembarked once she arrived back at Heathrow, which she thinks was due to staff shortages or lack of planning.

"My son had asked for assistance for me. When we got to the terminal we had to walk quite a distance to find out about where the assistance would be. We were pointed to Point G, we were at Point A which meant further walking. It was quite a distance away. When we got there, there were 2 wheelchairs there but nobody to push the wheelchairs. There were two other people waiting. So we decided to go on our own. That was a long, long walk." (Heathrow user, PRM)

"They said wait on the plane till everybody goes. We sat in the front of the plane and we were there for about 25 minutes. The crew had changed. They'd all gone off with all their luggage. The cabin crew had left the plane and we just sat and sat and sat. After about 25-30 minutes they said the wheelchairs had arrived and I went off. So that wasn't a very pleasant experience." (Heathrow user, PRM)

- One participant experienced a flight delay during which time she did not have any assistance.

"We went through the fast track bit. We pretty much went to the front of the queue. They took me to the gate and we got there pretty quickly. They were really nice, I was asked if I wanted any refreshment and they got me a coffee… Then they put me in a seat because then there was a bit of a delay. I was pretty much left there. I was sort of stuck there from then onwards… They didn't say how long it was delayed by. Why it was delayed. There was no staff there." (Heathrow user, PRM)

- A couple also complained of long queues, over-crowding and lack of amenities (disabled toilets, refreshments) at the gate lounges, and there was also a criticism about last minute gate changes.

7.3.2 Connecting and foreign resident passengers

International and domestic connecting passengers and foreign resident passengers had in common that they were mostly unfamiliar with Heathrow, as it was often their first experience of using it. Therefore ease of navigation (e.g. via signage, information desks) was prioritised. Connecting passengers had the additional pressure of needing to make their way through the airport in sufficient time to make their onward flight. In some cases this was complicated by needing to change terminals which required additional travel and the need to pass through security screening.

In most cases, these passengers were satisfied with their experience of using Heathrow and did not experience any notable disruption.

For some, the experience of using Heathrow was better than they expected as they were initially anxious that it may be very crowded or difficult to navigate due to its size and the volume of passengers it processes.

Some passengers specifically mentioned that the signage at Heathrow is clear and some connecting passengers who were met by a staff member appreciated being directed to where they needed to be to take their onward flight.

"It was a very nice airport. The staff were more organised, more focused on doing the service and not just doing the job. They were paying attention to how to deal with those who fly. They were willing to help which made me more calm, more relaxed." (Heathrow user, international connecting passenger)

There were also a couple of reports of being helped by Heathrow staff with issues related to loading their bags at their airport of origin; they specifically mentioned that they appreciated receiving a voucher to use at the airport in acknowledgement of the disruption they had incurred because of a problem elsewhere.

"(The airport representative) was really helpful and kind. He also gave us 2 coupons of £10 so we could buy something to eat and drink… I really trust airports and their employees and then I feel disappointed if I feel that there's no one who can help. In this case, I felt Heathrow was very professional and I felt everything was taken care of… I felt safe in a bad situation. I also felt that the airport was trying to say I'm sorry even though they weren't to blame." (Heathrow user, international connecting passenger)

However, there were also some reports of issues:

- Some felt there was insufficient assistance for connecting passengers, including to prioritise them through security and help them change terminals if required.

"Maybe when it is rush hour put more staff in transit area. So it will be faster." (Heathrow user, international connecting passenger)

- More generally there were some criticisms of the ease of getting around Heathrow, particularly for older people or those travelling with small children, and a suggestion for earlier warnings of gates to be provided.

"It felt like a maze. I kept on having get into one elevator, walk a distance and then get into another." (Heathrow user, foreign resident passenger*)*

"The gate didn't come up until 25 minutes before boarding. It's such a big airport so it makes you walk faster than you want to and start sweating and getting frustrated." (Heathrow user, foreign resident passenger)

- One person experienced a flight delay and felt there was insufficient communication from the airline.

 "The [airline] staff didn't communicate well. There were a lot of elderly people waiting for the flight and no one helped them. They didn't say it was delayed initially. Eventually they gave vouchers for lunch but nobody knew where to go or what to do with these. Then they didn't say that the terminal had gate changed and this caused a lot of confusion. One passenger found out by checking an app and he told us all." (Heathrow user, foreign resident passenger)

8. Measures suggested by consumers to reduce and manage disruption

8.1 Key findings

- Participants had a number of their own (unprompted) ideas about additional measures to reduce journey disruption and minimise the impacts of disruption on passengers.

- Suggestions were most frequently made about improving passenger information, both in the event of disruption and as a preventative measure. There was a lot of spontaneous interest across all demographic groups in the potential for technology to improve the information they receive – this included SMS, apps and smart signage.

- In addition, participants proposed ideas related to:
  - More passenger education and stricter/more consistent application of rules;
  - Modification of processes that could create disruption;
  - Increased target setting and monitoring;
  - Faster response to problems and more contingency;
  - More consistently applied 'soft compensation';
  - Making the space more conducive to waiting; and
  - Clearer information on compensation and making it easier to clam.

- The appeal of a number of propositions was also tested, including:
  - Reducing the number of flights at congested airports;
  - Increasing or moving resources to improve resilience;
  - Increasing 'block times' (the time scheduled between departure and arrival of flights) to provide more leeway; and
  - Improving information provision (both in the event of disruption and more general information regarding on-time performance).

- Improved information provision was, not surprisingly, the most popular, although general information regarding on-time performance had limited appeal. A number of participants could also see benefits from increasing or redeploying resources, although participants were polarised on whether they would be prepared to pay extra for this. Increasing block times was unpopular as it was not perceived to address the core problem and could be seen as misleading. Similarly, most rejected the prospect of reducing flights, as they would not be prepared accept lower choice.

- Overall, disruption was generally not seen to be big enough problem currently

to warrant the trade-offs of either reduced choice or increased prices associated with certain remedial measures suggested. Views on this may change should disruption be seen to worsen. However, consumers would first need to be convinced that what they are 'paying for' will be genuinely effective in improving resilience.

8.2 Participants' own ideas

Participants suggested a number of their own (unprompted) ideas for what additionally could be done at London airports to reduce journey disruption and minimise its impacts on passengers. Some of these were measures designed to reduce disruption, while others were possible ways of minimising the negative impacts of disruption on passengers.

8.2.1 More passenger education and stricter/more consistent application of rules

As passengers were felt to be one of the leading causes of disruption, it was felt that ongoing education would be needed on what is required from people using airports and flying (e.g. what to do at security, luggage requirements, when gates close etc.).

"Yeah, so it would be helpful if, before you have a flight, there were actually top tips for getting ready for security or something." (Heathrow users, short haul flyers)

"Educating the traveller will help to reduce disruption, such as including on websites what they can and can't bring." (Heathrow user, international connecting passenger)

Stricter and more consistently applied rules were also expected to help. In particular, stricter enforcement of rules was suggested on the number and size of bags passengers are allowed to carry on board. This was because one of the main causes of boarding queues was felt to be passengers lining up prematurely because they were worried there would not be sufficient room in overhead lockers for their carry-on luggage. One of the contributing reasons for this behaviour was believed to be that rules on hand luggage were not harmonised between airlines and also not always consistently applied. However, some also felt that where this rule is strictly enforced it could cause delays at check-in.

"Yeah, everybody rushes to get on the plane I suppose first, otherwise you get onto the plane and there's nowhere to put your hand luggage…They should have standard sizes, all these airlines, for hand baggage, because there's so much confusion." (Luton users, frequent flyers)

"Most people follow the rules but some people push the boundaries with too much luggage or bringing the wrong things. I had my hand luggage approved but one gentleman had three bags which I didn't think was fair. They were in our overhead locker which meant we couldn't keep ours close to us and they got a bit squashed.

Airlines should be a bit stricter on this." (Heathrow user, foreign resident passenger)

8.2.2 Modification of any processes that could create disruption

Some airline requirements were felt to contribute to disruption. For example:

- Overbooking flights (meaning that some passengers will be asked to change flights).

- Requiring checked in luggage to be paid for (which can lead to there being too much hand luggage for the aircraft to carry meaning that it then needs to be moved).

- Not boarding passengers in rows but all at once (meaning there can be bottlenecks onboard while people wait for others in front of them to stow their cabin bags and sit down).

In addition, participants suggested that airports also make some changes such as:

- Provide earlier warning of gates or at least the zone of the gate so that passengers have time to get themselves there without rushing. This was regarded as being particularly important for people with mobility restrictions or travelling with small children.

- Consistently prioritising passengers through security who have flights that are close to boarding.

- Not requiring passengers to pay for plastic bags at security (as is reportedly the practice at Luton).

 "Over-selling airline seats for the planes. I've had that a few times before, where they've over-sold the plane and then they offer you compensation when you get there, do you want to get on the flight, do you want a 2-hour delay, do you want a 4-hour delay? These are the compensation packages you can have." (Heathrow users, frequent flyers)

"When you turn up to get on the flight and then they don't have room for everybody's hand luggage, so then they've got to take your hand luggage off you and that's really annoying." (Heathrow users, frequent flyers)

"I mean they encourage you to take hand baggage, but as soon as you get to the door they take it off you and put it in the hold of the aircraft." (Luton users, frequent flyers)

"The annoying thing with budget airlines is that because you're just herded on, so the person in seat number 1 is trying to put their baggage in and you're all waiting." (Luton users, frequent flyers)

8.2.3 Increased target setting and monitoring

When briefed that the CAA sets resilience targets for airport authorities at Heathrow and Gatwick to meet in ensuring service continuity, particularly in times of significant disruption, participants liked the idea of parties involved in aviation needing to meet standards in return for payment.

There was seen to be scope to extend this to day-to-day disruption, to focus on more than just delays (e.g. queue lengths, time to receive baggage, lost bags etc.), and potentially also more than just airport authorities (e.g. airlines, ground staff etc.).

"I would say that last bit where the CAA set standards that these airports need to meet in terms of adverse conditions, why couldn't that apply to the day to day running?" (Heathrow users, non-frequent flyers)

"It's the same as pretty much everything. If you've got targets, you know if you're going to meet your targets, you get a bonus at the end of it and you're always going to strive to do that." (Luton users, non-frequent flyers)

In addition, there was felt to be an opportunity to monitor the effectiveness of disruption handling (e.g. through customer satisfaction monitors) and to set targets for this as well as the level or length of disruption.

"I actually think (they should monitor) service, how each airline handles the delays …Yeah passenger satisfaction and feedback you'd have to have the discussion with people who have actually been impacted." (Heathrow users, short haul flyers)

"Length of queues, the efficiency and the support and guidance they're giving for people to actually pass through." (Heathrow users, short haul flyers)

8.2.4 Faster response to problems and more contingency

It was suggested that, given all the moving parts and parties involved in airports, there should be an overall coordinator who was concerned with achieving seamlessness across the whole passenger experience.

"I don't know if they already have it, but it's a coordinator to coordinate all the component parts and to give the passengers as much warning as they can of what not to bring, everything. At the busiest times make sure everything's open, look after staffing, and have a backup plan just in case." (Heathrow users, frequent flyers)

"I think you've got to think about the entire customer journey…you know all these different elements that the customers are going through. Can you make that smoother, work out where the problem areas are and look to kind of link it up better?" (Gatwick users, frequent flyers)

In addition, some participants spontaneously suggested the development of a flexible, multi-skilled staff pool for rapid response to a variety of issues and problems.

"If you cancel an entire flight then they should use their commonsense and have enough staff to have like a pop up cancellation booth so there's enough people that can then reschedule … Yeah, there's always one person with a clipboard telling you it was cancelled and everyone just mobs them." (Heathrow users, short haul flyers)

"Like a SWAT team, sweep in where they're needed. Trained in all areas." (Gatwick users, frequent flyers)

There was also felt to be value in increasing resourcing generally in order to provide contingency at peak times and when problems occur.

"Airports know the volumes travelling through on a daily basis, so surely just open more gates, or whatever…. There must have times where capacity is busier than others, so they could put staff on in those times." (Heathrow users, frequent flyers)

"It probably ultimately comes down to staffing, to increase the numbers. I mean you can't just throw staff at it but they need to find out what the shortfalls are, where extra staff are needed and how that could improve things." (Gatwick users, frequent flyers)

"I just think they should maybe have a couple of spare planes hanging around." (Luton users, non-frequent flyers)

8.2.5 Improved passenger information

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.

"It's giving that information ahead of a flight, 'look, you need to get there a little bit earlier, security is going to take this much, passport check is going to take this much, getting on the plane is going to take this much'. Because you don't know if you're not a regular traveller." (Stansted users, non-frequent flyers)

"Even if they let us know, if my flight's taking off at 10 o'clock and they know it's going to be disrupted until 3pm. They could let me know I don't need to go to the airport so early. You get there and it's got disruption all over the board and half of the people are saying 'why didn't someone just let us know?'" (Heathrow user, PRM)

There was a lot of spontaneous interest across all demographic groups in the potential for technology to improve the information they receive on disruption – this included SMS, apps and self-serve booths. A number could also see how apps could help *prevent* disruption e.g. by providing real time information on expected queue lengths, walk times to gates and gate change alerts.

"I agree it would be good if you got a text, if they knew it was going to be delayed, before you actually left for the airport. You've rushed like a lunatic to get there and might have paid for taxis you know." (Heathrow users, short haul flyers)

"They could send out an entire text alert to the aircraft and say 'this is delayed, we've got all these other flights, do you want to move onto another flight?'" (Heathrow users, frequent flyers)

"Why not a text to say 'at the moment we're looking at 2 hours in security'… And could they text you your gate number instead of you having to be constantly looking at the board." (Stansted users, frequent flyers)

"You can check in on your phone, why can't they have like a system where it says 'queue time to security will be this amount of time'? It sees where you are on your navigation and it can tell you how long it's going to take you to walk through security, how long it's going to take you to get to your gate and then alerts you if there's a delay cos your phone will know exactly where you are at that point. If you're running late and it's a 20 minute walk it can say 'you need to leave now to arrive at this time' and kind of alert you." (Heathrow users, short haul flyers)

"Maybe there should be automated systems like the self-check ins so you can like input your cancelled flight and then have all the options to reschedule." (Heathrow users, short haul flyers)

"An app that wasn't just airline specific, maybe related to their airport…You could type in your connecting flight and it would tell you where you needed to go." (Heathrow user, domestic connecting passenger)

"A Smartphone app. Like a Gatwick app or Heathrow app or all London's app" (Heathrow user, PRM)

However, technology did not reduce the perceived need for sufficient staff to be on hand to help any passengers who are not technologically savvy or who have more complex problems (e.g. cancelled flights, missed connecting flights etc.)

"So you can actually, you know, liaise with a person, that you can go and talk to a specific person and say 'my flight's been cancelled, what do I do?'" (Luton users, frequent flyers)

"I think it's having people to talk to, you know, enough staff there, because if you've got a flight of a few hundred people and there's 1 desk with 2 girls behind it getting bombarded, you know, you need an army of people to deal with this." (Stansted users, non-frequent flyers)

In addition, a number of participants suggested improvements to signage such as earlier warnings of passenger requirements at security screening, earlier notification of gates and incorporation of timing-related information into signs (such as walk times to gates, current queue times/fastest queue etc.).

"Give a general idea of where the gate number is, so if they can't give you an exact gate number, but they know it's probably going to be in that area of the airport. And give you that earlier on, so at least you can make your way to that vicinity." (Gatwick users, non-frequent flyers)

"I feel like they should pre-warn you of how long queuing actually takes, you know, like you get at a theme park." (Gatwick users, non-frequent flyers)

"You know when you get there and you see a queue, I wish they just had a screen, because it's like when you go to Thorpe Park and you think 'oh, that one will be fastest'." (Stansted users, frequent flyers)

8.2.6 More consistently applied 'soft compensation'

There were also a number of suggestions made about improving passenger welfare in the event of disruption, including by more consistently applied 'soft compensation' measures. In addition to food and drink vouchers, there were mentions of providing children's activities, reimbursing passengers for any additional car parking or travel expenses, and giving passengers premium lounge access.

"It can be expensive at the airport, you know. It should be case of well, if you've been delayed for over an hour or something, you get coffee and a sandwich somewhere." (Heathrow users, short haul flyers)

"If they gave out vouchers for food and drink, if you're stuck there longer, then I think people would be a lot happier." (Stansted users, non-frequent flyers)

"Gestures such as free food and drink make you feel like you're treated as a valued customer. That they're trying to minimise the inconvenience." (Heathrow user, domestic connecting passenger)

"If your flight was delayed, you know, you have to go through all the rigmarole to claim it back. Why don't they do it so if it's an hour's delay someone from like Customer Services comes out and then, say, 'right, there's £10 voucher'. I know it's something small, but it's a gesture, you know?" (Stansted users, frequent flyers)

"There should be something to say, we're going to be delayed for a couple of hours, if you've got a kid they could give them colouring books just to keep them busy. This will release parents' stress they know they can't get the stuff out of their suitcase any more." (Heathrow users, non-frequent flyers)

"Or even maybe compensation if you've got somebody picking you up and they're waiting. Car parks are so expensive so if they could offer some compensation for your transport." (Heathrow users, short haul flyers)

"Could they give you access to the premium lounge or pay something towards your next ticket?" (Heathrow user, domestic connecting passenger)

8.2.7 Making the space more conducive to waiting

Participants felt that the impact of delays could be reduced if the environment was made more conducive to waiting. In addition to ensuring sufficient seating, particularly for PRM, it was suggested that airports consider introducing better core amenities at the gate (toilets including for disabled people, refreshments), more free play areas, workstations and power points, and that they extend the time free Wi-Fi provision is

offered for anyone who is delayed. Some drew on their experience of other airports internationally in making suggestions here.

"I'd really appreciate if there was more plug sockets around the communal areas because, especially when you're delayed, the only thing I have to do is work on my laptop and there definitely needs to be more access points. Or if you know what is beyond at that gate, so if there is a coffee shop or there is food or there is like Wi-Fi or whatever. And it would be really great to have hot-desking workspace."
(Heathrow users, short haul flyers)

"They could make each terminal where you could get some kind of refreshment or a duty free shop. You've got the great big hub of all the terminal and when you go into your gates there's nothing there." (Heathrow user, PRM)

"Do you know what, when I travelled through Newark in June they had these little cocktail bars with an I-Pad. You get a charging station and you can order your drink on the I-Pad, you can watch the TV, you've got your flight coming up like where you are in the flight, the gate, constant updates. It was amazing, it was so good. Ones in Germany they have work pods. Yeah, little work stations, they're fantastic."
(Luton users, frequent flyers)

"There are lots of things they could take from international airports. I went to Canada last year and we got a connecting flight whilst we were there. They had desks, or they had free I-Pads, the children got entertained as they were waiting. Obviously there's a huge cost to that, and I'm not saying that's the right thing to do, but there are things that they could put in place to make the whole experience nicer, which I think is what some of our smaller, but still busy, airports are lacking."
(Luton users, non-frequent flyers)

8.2.8 Clearer information on compensation and making it easier to claim

Another area where better information was seen to be needed relates to what compensation passengers are entitled to in the event of significant disruption.

There were a number of examples given where participants experiencing a flight delay or cancellation were not made aware of what they were entitled to (including one person who slept at the airport rather than a hotel for this reason).

"There's a compensation scheme, but it's not very well advertised. It's very hidden, because they just don't want to give you the money. I also think it's something like minimum of an hour, or 2 hours I think before you can get it." (Gatwick users, non-frequent flyers)

"I need to know that the money I'm spending can be refunded. For us it's not obvious because we're not flying every day." (Heathrow user, international connecting passenger)

Some also looked into claiming compensation but were deterred as they felt the process to be too complicated. There was a suggestion made that compensation

payments should be made automatically rather than placing the onus on the passenger to claim.

"It's compensation, I suppose, it's got to be easier. You can be on a plane and everyone's done the same journey. If you've all been delayed for 3 hours why can't they just give everyone the compensation? Yeah, because a lot of people just can't be bothered (to claim)." (Gatwick users, frequent flyers)

8.3   Reactions to some options and associated trade-offs

Participants were finally provided some suggestions of possible ways of reducing or managing disruption. These included:

1. Reducing the number of flights at congested airports

2. Increasing or moving resources to improve resilience

3. Increasing 'block times' (the time scheduled between departure and arrival of flights) to provide more leeway

4. Improving information provision (both in the event of disruption and more general information regarding on-time performance)

Participants were asked to consider the positive and negative points, and potential trade-offs, of each idea and then to compare all of them to determine which have comparatively more and less appeal.

8.3.1   Reducing the number of flights at congested airports

While reducing flights was felt to have the potential to reduce congestion-related delays, most felt that this would be too much of a price to pay given that it was expected to lead to reduced choice and result in higher airfares unless the unmet demand could be mopped up elsewhere.

In addition, it was unclear to participants how much of a difference this would make to delays overall, since not all are related to congestion, or whether this would also improve other types of disruption.

The bottom line is that disruption was not seen to be currently a big enough problem to accept the trade-offs associated with this measure, with the key sticking point being a reluctance to accept a reduction in choice.

"I think it just means more airports, or you triple the cost of a flight. You're rationing anyway to do that." (Heathrow users, frequent flyers)

"People want more choice, not fewer choices." (Gatwick users, non-frequent flyers)

8.3.2 Increasing or moving resources to improve resilience

A number of participants' own suggestions either directly related to increasing staffing or were felt to require a well-staffed airport and airlines in order to deliver. When presented with this idea, the benefits to passengers were readily apparent.

"You'd probably be a bit calmer. There'd be more people to talk to, if you were struggling." (Stansted users, frequent flyers)

"I like that one because it would mean there are more people around - more communication, more people to help you. You're going to feel more comfortable." (Heathrow user, PRM)

Overall, the prospect of moving resources had most appeal, as this was not necessarily felt to require additional investment or lead to increased costs to passengers. Participants mainly envisaged staff being moved about, and they felt this would only be possible with a well-trained, motivated and flexible workforce.

"If you gather more flexible staffing, you know, it's really, really busy over there, you can move them around can't you? I mean they need to put on extra staff when they know they're going to be really busy, you know, in the certain holiday periods." (Stansted users, frequent flyers)

"A flexible workforce, so where a problem's associated with one particular area in the airport, people are shifted across. Like they do in the supermarkets." (Stansted users, non-frequent flyers)

The response to the prospect of increasing resources was more mixed, mainly due to differences in opinion regarding the possibility of paying more as a result. Some would be prepared to bear a small cost increase for improved resilience, however others would not want to see any increase in airfares and some felt that these measures should pay for themselves if they lead to less disruption and greater efficiency overall. There were also some who would be reluctant to pay more for this as they were not confident that doing so would lead to noticeable benefits. One of the reasons for this is that not all disruption is related to capacity constraints so it was felt that more resources would not necessarily help in all cases.

"If the efficiency is there the price is higher than it is now I'm okay with that… I don't think it would go up that much. 5% it wouldn't really impact on me too much. I would be happy if I knew that it was going to be ultimately totally efficient." (Heathrow users, non-frequent flyers)

*"Would we not like a few more pounds on the flight to have backup systems, you know, so if the **** hits the fan, you know, there's things in place to deal with it"* (Stansted users, non-frequent flyers)

"I'll be happy to pay that extra because I know there's more people around to help me." (Heathrow user, PRM)

"But you think it should come from the profits, not from charging more." (Stansted users, non-frequent flyer)

"I think it doesn't matter what they put in place, there's always going to be a chance of you being delayed, so you're not going to want to pay more to not be delayed and then still be delayed." (Stansted users, non-frequent flyers)

"I don't know, all of my problems have been weather-based, so how are they going to guarantee that?" (Heathrow users, frequent flyers)

"Ultimately, you might have paid that extra money but things can still be beyond those circumstances and they're completely out of your control so then you would have paid £20 for no benefit." (Gatwick users, frequent flyers)

Some also had issues with paying for resilience because of the perceived difficulty making any such surcharge transparent to passengers.

"I think customer perception would become positive for airports because things would become easier in their transport and would become negative for airlines because their fares went up, I don't think it would necessarily make the connection." (Heathrow users, short haul flyers)

"I think you never really know what you're paying for, you're just paying for an experience. So one thing could go really well and something else could go really wrong, all you know is you paid a certain amount and you're just kind of there. So unless everything was broken down as to exactly what you're paying for you never really know when you're buying a ticket." (Gatwick users, frequent flyers)

"I guess there's always that concern that you pay more and the level of service doesn't get any better. If they're measurable if the whole thing is transparent and you can measure it, then at least you feel 'hold on, I've paid for this. You didn't meet your target. I want that £5 back'. But I think it would be a bit difficult to administer." (Heathrow users, medium-long haul flyers)

8.3.3 Increasing block times

The idea of increasing block times was generally rejected as it was felt not to address the core issue and it felt misleading to a number of participants.

"It seemed to me that it's not actually addressing the problem. It's just like you can't score a goal in 90 minutes, so we've extended it to 120 minutes including extra time." (Gatwick users, non-frequent flyers)

"You risk spending even longer in the airport if things go wrong." (Heathrow users, short haul flyers)

"We were saying it's just hiding the delay basically, isn't it?" (Gatwick users, frequent flyers)

*"They do it so that they can fudge the statistics, or are they going to say that it's not really fudging the statistics, it's to make us feel better?" (*Heathrow users, frequent flyers)

*"When you're on [a specific airline] though they always over-egg the flight time…
So they'll just fiddle around with the matrix, so they will manipulate the statistics to
make it work. That's how I feel about that."* (Heathrow users, frequent flyers)

*"Somebody mentioned earlier about the flight times aren't the genuine times. If you
look at a flight time for [certain specific airlines], I swear they add about 20 minutes
to half an hour on as well…"* (Luton users, frequent flyers)

A few also identified that this measure could reduce the number of flights and therefore
lead to less choice and increased fares.

However, a minority felt that it may be helpful to increase block times slightly where
flights were being consistently delayed because of congestion.

*"Yeah, it allows for more issues, you know, so if there's more problems they've got
a bigger timeframe to rectify it."* (Gatwick users, non-frequent flyers)

*"If there are a lot of little delays then they might need to add bandwidth. But if the
delays are longer then there are probably other factors that need to be dealt with."*
(Heathrow user, domestic connecting passenger)

8.3.4 Improving information provision

As previously mentioned, more and better information was regarded as key to
improving the management of disruption and minimising the impact on passengers. As
such, there were a number of spontaneous suggestions made around this theme.

However, some participants acknowledged that this would not, in itself, reduce
disruption or increase resilience. For this reason, some people felt that it should not be
the only type of measure introduced but seen as part of the solution.

The idea of providing passengers with more general information, e.g. relating to on-
time performance, received only a lukewarm response from most. The main reason for
this was that participants felt that they already had a lot of factors that they were
weighing up at the decision-making stage and they felt that on-time performance would
be less important to them overall compared to price, schedule, brand etc.

*"It's kind of a bit information overload. And you'd be the unlucky one when you read
it there the best performance and then you get 20 hour delay*." (Heathrow users,
short haul flyers)

8.3.5 Summary of views on trade-offs to reduce disruption

Overall, disruption was generally not seen to be big enough problem currently to
warrant trade-offs of either reduced choice or increased prices associated with certain
remedial measures suggested. Views on this, however, may change, should
disruption be seen to worsen.

Another reason for some consumers to be sceptical about the trade-offs suggested
was that they were not always convinced that the measures suggested would be

effective in reducing disruption or felt that they only addressed part of the problem (e.g. two of the ideas were addressed at reducing flight delays rather than other forms of disruption).

Appendix 1 – Discussion guides

Discussion guide for groups

Introduction and warm-up
(FIRST HOUR – 10 mins)
	• Moderator introduction
	   o Purpose of research to understand experiences of travelling through London/SE airports including LHR, LGW, LTN and STN
	   o Ground rules – not a test, no right or wrong answers, confidential, recording, one at a time
	   o Housekeeping – fire procedures, refreshments, toilets, mobiles
	• Participant introductions
	   o First name, age, occupation, family status
	   o Which London/SE airport/s they have used in the past 12 months
	• Warm up
	   o Best things about using LHR/GW/LTN/STN airport
	   o Main issues/problems/frustrations when using LHR/GW/LTN/STN airport
	       ▪ Probe fully any references to disruption

Consumers' initial understanding of disruption *(10 mins)*	• If I use the term 'journey disruption' in association with using LHR/GW/LTN/STN airport, how would you define this/what would you interpret this as meaning or including? • Which type/s of disruption do you think happen most often at this airport? Is this the same or different to the types of disruption that most frequently occur at other London/SE airports or airports elsewhere? • What do you think are the main causes of disruption at this airport? Is this similar or different to the causes of disruption at other London/SE airports or airports elsewhere? *Look out for mentions of aspects beyond anyone's control including adverse events vs. disruption related to day-to-day management of air travel given congestion/capacity constraints*
Experiences and perceived	• What if any types of disruption have you personally experienced in using this airport, other London/SE airports or

impacts of disruption
 	
(15 mins)
	elsewhere in the past 12 months? *Ask those who have experienced disruption:*
	
	    o Which specific airport/s have you incurred disruption in?
	
	    o How has this affected you? What if any impacts did it have on you? *Probe for immediate vs. knock on effects and financial vs. non-financial impacts.* How did this make you feel?
	
	    o How well or poorly do you feel this disruption was handled?
	
	    o Has it made any difference to how you perceive specific airlines or airports?
	
	• Has the experience of disruption or expectation of possible disruption at this or other airports affected your behaviour in any way? *Unprompted first then prompt on whether this has:*
	
	    o Affected their choice of airports or airlines
	
	    o Meant they factor disruption into their journey e.g. by arriving at the airport earlier or allowing more contingency between scheduled arrival time and any plans
	
	    o Led them to be prepared to use their time as efficiently as possible if they incur disruption
	
	• What types of disruption would you expect to cause passengers most impact/inconvenience overall? *Probe:*
	
	    o Whether any difference in importance perceived between departing or arriving on time
	
	    o Importance of receiving baggage on time compared to flight punctuality
	
	    o Comparative importance of other forms of disruption such as queuing to get through the airport
	
	• Would you expect certain types of people or people making certain types of journeys to be more affected than others by disruption? If so, who and how? *Unprompted first then paired task to consider impacts expected for different types of flyers/journeys e.g.:*
	
	    o Business vs. leisure flyers
	
	    o People with who are elderly or have disabilities or health conditions

	o People who are making connecting flights
	o Any other scenarios mentioned (e.g. frequent vs. infrequent flyers, short vs. medium-long haul flyers, those travelling for a particular event etc.)
	• What if any impacts would you expect disruption to have on the aviation industry (e.g. airports, airlines) and to consumers generally? (*Look out for any awareness that disruption costs industry money which can translate into higher fares*)
Perceptions of current levels of disruption *(10 mins)*	• Overall, do you regard some level of journey disruption as being inevitable or not? Why/why not? Is there a reasonable/acceptable level of disruption? If so, what is this? *Probe for acceptable proportion of flights/passengers affected, length of disruption etc.* • How acceptable or unacceptable do you regard the level of disruption at this airport to be? Why? *Probe fully* • How would you expect the level of disruption at this airport to compare with other London/SE airports and airports elsewhere? Why? *Probe fully* • Would you expect the level of disruption at this airport to have changed over the past 5 years or not? In what way and why? *Probe fully*
Perceptions of disruption management and improvement *(15 mins)*	• Who do you see as being most responsible for air travel disruption when it occurs? Why? *(Look out for mentions of airport operator, airlines and other parties)* • And who do you regard as being most responsible for managing and reducing disruption? Why? • How well or poorly do you believe different types of disruption are currently being handled at this airport? Why? What sorts of things are you aware of or expect are being done? *Probe fully.* How does this airport compare with others in London/SE and elsewhere in terms of handling disruption? • How well or poorly do you believe passengers are being looked after and receiving information when there is disruption at this airport? Why – what gives you this impression? *Probe fully.* How does this airport compare with others in London/SE and elsewhere in terms of looking after passengers and providing them information in the event of disruption?

Consumers' views on disruption post-exposure to information *(SECOND HOUR - 20 mins)*	***The information contained in the stimulus will be presented selectively in order to prompt on aspects not already mentioned spontaneously***
	• *Show information on types of disruption*
	o How does this compare to the types you identified?
	o Which of these do you expect to be most prevalent at this airport compared to other London/SE airports?
	o Which of these would you expect to have the most serious impact on passengers?
	o Are there any types that you would not normally notice or factor in as disruption?
	o Since not all forms of disruption are now routinely monitored (main focus is on delays), what should be monitored more regularly/what data should be collected by the CAA/others?
	• *Show information on current levels of disruption*
	o How does this compare to expectations?
	o What if any difference does knowing this make e.g. to views of the acceptability of current levels of disruption?
	• *Show information on causes of disruption*
	o How does this compare to your initial views on causes?
	o Do you distinguish between disruptive events and day-to-day causes in how you perceive disruption?
	o Does knowing about the congestion/capacity constraints make any difference to your views?
	• *Show information on impacts of disruption*
	o How does this compare with your initial views on impacts?
	o How do you feel about the costs of disruption potentially being passed onto consumers as higher fares?
	• *Show information on current measures to manage and reduce disruption*
	o How does this compare to what you expected to

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	happen?
	o Does knowing more about the parties involved and the measures in place make any difference to your views?
Views on possible measures to improve resilience *(40 mins)*	• *Spontaneous brainstorm (moderator to flipchart):* What more, if anything, could be done to manage or reduce different types of disruption at this and other London/SE airports you have experience of?
	• *Introduce potential scenarios, then paired exercise to score each out of 5 and indicate perceived pros and cons. Then discuss as a group:*
	o Each pair to provide scores and perceived pros/cons for each scenario
	o *Probe information provision* – what type of information would be useful and when should it be provided?
	o *Introduce CAA's trade-offs:* Does this make any difference to views?
	o Best idea/s overall from own brainstorm and suggestions? Why?
	o Would they be prepared to pay more for their ticket for lower disruption? Why/why not? How much?
	• *Summing up:*
	o How acceptable or unacceptable is the level of disruption at this airport? Score out of 10 and reasons. How do other London airports compare and why?
	o Main impacts of disruption on passengers?
	o What more, if anything, needs to be done?

Discussion guide for depths

Introduction and warm-up *(5 mins)*	• Moderator introduction
	o Purpose of research to understand experiences of travelling through LHR
	o Ground rules – not a test, no right or wrong answers, confidential, recording or note taking

	• Participant introduction
	
	    ○ First name, age, occupation, family status
	
	    ○ How many times used LHR in last year, main reasons, last time used
	
	    ○ For face-to-face depths: Nature of disability or health condition that makes airport use challenging and whether used assistance at LHR
	
	    ○ For tele-depths: What flight connection were they making
	
	• Warm up
	
	    ○ Best things about using LHR airport
	
	    ○ Main issues/problems/frustrations when using LHR airport

Experiences and initial views on disruption *(15 mins)*	• If I use the term 'journey disruption' in association with using LHR airport, how would you define this/what would you interpret this as meaning or including? • What if any types of disruption have you personally experienced in using LHR in last 12 months? And what if any types of disruption have you experienced using other airports in the past 12 months? • Which type/s of disruption do you think happen most often at LHR? Is this the same or different to the types of disruption that most frequently occur at other airports? • What do you think are the main causes of disruption at LHR? Is this similar or different to the causes of disruption at other airports*?* • *Show/read out information on types and causes of disruption we are interested in (refer to stimulus pack). Probe fully on views of these types and causes of disruption*
Perceptions of impacts *(15 mins)*	• How has the experience of disruption at LHR affected you? What impacts did it have? How did this make you feel? How compare with impacts of disruption at other airports? • Has the previous experience of disruption at any airport made any difference to how you perceive specific airlines or airports? Has it made any difference to your behaviour? • What types of disruption at any airport would you expect to cause passengers most impact/inconvenience overall?

	• Would you expect certain types of people or people making certain types of journeys to be more affected than others by disruption overall? If so, who and how? *Probe:*
	
	    ○ Pax making connecting flights
	
	    ○ PRM
	
	• What if any impacts would you expect disruption to have on the aviation industry overall (e.g. airports, airlines) and to consumers generally?
	
	• *Show/read out information on possible impacts (refer to stimulus pack). Probe fully on views of these impacts*

Perceptions of current levels of disruption *(10 mins)*	• Overall, do you regard some level of journey disruption as being inevitable or not? Why/why not? Is there a reasonable/acceptable level of disruption? If so, what is this? • How acceptable or unacceptable do you regard the level of disruption at LHR? Why? *Probe fully* • How would you expect the level of disruption at LHR to compare with other airports elsewhere? Why? *Probe fully* • Would you expect the level of disruption at LHR to have changed over the past 5 years or not? In what way and why? *Probe fully* • *Show/read out information on levels of disruption (refer to stimulus pack). Probe fully on views of these levels*
Perceptions of disruption management and improvement *(10 mins)*	• Who do you see as being most responsible for air travel disruption when it occurs? Why? • And who do you regard as being most responsible for managing and reducing disruption? Why? • How well or poorly do you believe different types of disruption are currently being handled at LHR? Why? What sorts of things are you aware of or expect are being done? *Probe fully.* How does this airport compare with others in terms of handling disruption? • How well or poorly do you believe passengers are being looked after and receiving information when there is disruption at LHR? Why – what gives you this impression? *Probe fully.* How does this airport compare with others in terms of looking after passengers and providing them information in the event of disruption?

	• *Show/read out information on current measures to manage/improve disruption (refer to stimulus pack). Probe fully on views of these measures*

Views on possible measures to improve resilience
 (5 mins)
	• What more, if anything, could be done to manage or reduce different types of disruption at LHR? What about at other airports you have experience of?
	
	 • *Show/read out potential scenarios (refer to stimulus pack):*
	      o Views on each idea
	      o Views on potential trade-offs associated with each idea
	      o Best idea/s overall? Why?

Appendix 2 – Stimulus

London/South East airport user research

Research stimulus

August 2016

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1. Types of disruption

- We want to understand **all forms of disruption** that could cause you **inconvenience** when using specific London/SE airports. This could be related to:
    - **Getting through the airport** (e.g. check-in, security, departure for outbound flights, immigration, baggage reclaim, customs/arrival for inbound flights)
    - **Taking off and landing** (e.g. push back from stand, taxiing to runway, takeoff for outbound flights, landing, taxiing to stand, disembarking from inbound flights)

- These **types of disruption** could include:
    - Flight delays or flight cancellations
    - Taking too long to queue at the airport (e.g. to clear security or at passport control)
    - Taking too long to board the plane
    - Taking too long on the tarmac before takeoff
    - Taking too long airborne before waiting to land at the airport
    - Taking too long to wait for luggage
    - Missing or damaged luggage
    - Any other forms of disruption causing passengers impacts/inconvenience

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2. Extent of disruption (delays)

- According to CAA data, the average **length of delay** across all flights in 2015 was around **15 minutes** across the 4 London/SE airports of interest, however this increased to **30 minutes** among those flights delayed (by at least 5 mins). It also varied across the year with **considerably longer delays over summer**, especially at Gatwick.

- Across the whole of 2015, the proportion of **flights delayed** by more than 15 mins was:
    - **24% at Heathrow** *(18m passengers)*
    - **31% at Gatwick** *(12.5m passengers)*
    - **21% at Stansted** *(4.7m passengers)*
    - **27% at Luton** *(3.3m passengers).*

- Both the level of delays and their length have been **increasing over time** at Luton, Stansted and especially Gatwick. By contrast, Heathrow has recorded stable levels and length of delays between 2012 and 2015.

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2. Extent of disruption (other types)

- **Heathrow and Gatwick Airports** are subject to additional CAA economic (price and service quality) regulation and these airports also **measure other aspects that could cause disruption** as part of monitoring their performance:
    - E.g. security queue lengths and availability of aircraft stands, baggage carousels etc.
  Findings of these data show consistently high performance that **meets or exceeds their targets** in most cases.

- In addition, the CAA surveys passengers about their satisfaction with airport operations. A survey from 2009 found that **baggage reclaim was the poorest performing aspect** of the passenger experience at Heathrow, Gatwick and Stansted airports (Luton was not covered):
    - One-quarter of all passengers waited for more than 20 minutes for their luggage, including 4% who waited more than 45 mins and 2% who did not receive their bag.

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3. Causes of disruption

- Disruption could either be related to:
  - **Events outside anyone's control** including significant disruptive events which are likely to be infrequent (e.g. adverse weather, security alerts, strikes)
  - Issues incurred in the **day-to-day management of air travel** – *it is this latter type of disruption that we looking to explore in this research.*

- Day-to-day disruption can be caused by factors that **airports, airlines, air traffic control or others** are responsible for.

- Some **specific causes** of day-to-day disruption could be:
  - Lack of capacity (e.g. runway, terminal, airspace)
  - Congestion (where demand exceeds capacity)
  - System failures
  - Technical issues
  - Passenger issues
  - Staff shortages
  - Knock-on effects from earlier delays.

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3. Causes of disruption (cont.)

- All London/SE airports are operating in a **capacity-constrained** environment where they face challenges to deliver the best possible service for passengers with the available resources.

- It is forecast that airspace will become **more congested** over the coming years in response to increasing demand/passenger growth and no decision has as yet been made about an additional runway.

- **Heathrow Airport** is subject to a cap on its number of flights per year and runways are already **operating at 98% capacity**
  - It therefore has **little room to spread the impact** of disruption across the day and even minor disruptions can have knock-on effects
  - Increased passenger demand is being met via larger and fuller planes which places **additional pressure on terminal activity and ground-handling**

- **Other London/ SE airports** are still growing their number of flights and having to deal with the impacts of increasing congestion

4. Impacts of disruption

- Lengthy disruption may cause passengers significant **inconvenience** and lead to both:
  - **Immediate <u>and</u> knock-on effects**
  - **Financial <u>and</u> non-financial impacts.**

- Some **specific examples** of these impacts could include:
  - Missing connecting flights
  - Missing or being late to events/meetings
  - Losing holiday time
  - Not being able to use pre-paid elements at the destination or needing to pay again (e.g. transfers, hotel bookings etc.)
  - Spending more money in the airport
  - General hassle and discomfort as a result of the disruption or its handling
  - Suffering from stress or anxiety as a result of the disruption or its handling.

4. Impacts of disruption (cont.)

- The impacts may be particularly significant for **specific types of passengers or journeys** e.g.:
  - Business flyers but also infrequent flyers or those travelling to attend a specific event
  - Passengers with disabilities or health conditions
  - Passengers making long-haul or connecting flights.

- Disruption also represents a **cost to airport operators and airlines**
  - Means less operational efficiency and requires additional resources to manage (e.g. higher fuel and staff costs)
  - Under EU law, airlines are obliged to provide food/assistance for lengthy delays and financial compensation may also be due.

- This could ultimately be **passed back to passengers in higher fares.**

5. Current measures to manage and reduce disruption

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- A number of **different parties** each play a role in managing and reducing disruption related to using airports and travelling by air:
  - **Airport operators** (own and maintain airport infrastructure – and airlines pay airports to use their facilities/services; have safety/security obligations; responsible for assisting disabled passengers on request of and funded by airlines)
  - **Airlines** (responsible for passenger welfare including information provision, aircraft maintenance and contracting ground-handlers – see also below)
  - **Ground-handlers** (perform activities such as refueling, catering, aircraft cleaning and baggage-handling)
  - **Air traffic control** (includes Tower Control which is responsible for guiding aircraft into and out of the airport, stacking and order/timing of takeoffs; also en-route air traffic control which can impose restrictions on speed or volume of airspace use if required)
  - **Airport Co-ordination Limited** (an independent organisation responsible for the allocation of slots and coordination of schedules at major UK airports).

5. Current measures to manage and reduce disruption (cont.)

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- There are currently a number of measures in place to manage and reduce disruption at all UK airports including the 4 London/SE airports of interest in this research. These include:
  - **Significant investment** in operational/technological improvements and innovations to make the best use of existing capacity
  - **Ongoing collaboration** between parties mentioned above to plan, manage and recover from disruption
  - Ensuring **passenger welfare** including information provision in the event of disruption
  - **Anticipating and proactively responding** to known likely causes of future disruption (e.g. adverse weather).

- In addition, the CAA requires Heathrow and Gatwick Airports to ensure these airports are **resilient and disruption is minimised** in response to significant adverse events
  - The CAA sets standards that these airports need to meet in return for the fees it receives from airlines. If they do not meet these they need to pay airlines a rebate and if the exceed these in all terminals airlines pay them a bonus.

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6. Ideas for reducing disruption

1. Reduce number of flights at congested airports	
Positive points	
Negative points	
Overall score out of 10	

2. Increase or move resources to improve resilience	
Positive points	
Negative points	
Overall score out of 10	

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6. Ideas for reducing disruption (cont.)

3. Increase airlines' 'block times' (the time they schedule between departure and arrival of flights) to provide more leeway	
Positive points	
Negative points	
Overall score out of 10	

4. Improve information provision (e.g. real time information of expected arrival times, reasons for delay, whether time can be recovered in flight. Could also be more general information on on-time performance before booking flight)	
Positive points	
Negative points	
Overall score out of 10	

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7. Reactions to trade-offs

1. Reduce number of flights at congested airports	
Possible positives	• Less congestion-related delays • Increased reliability
Possible negatives	• Reduced number of destinations or flight frequency • Increased ticket prices as demand exceeds supply

2. Increase or move resources to improve resilience	
Possible positives	• Less resource-related delay • Increased reliability
Possible negatives	• Increased ticket prices as airlines, airports etc. need to recover increased costs

7. Reactions to trade-offs (cont.)

3. Increase airlines' 'block times' (the time they schedule between departure and arrival of flights) to provide more leeway	
Possible positives	• On-time performance improves • Increased reliability compared to the scheduled times
Possible negatives	• Increased ticket prices as airlines would not be able to utilise their aircraft as much over the course of each day • Would not address the inconvenience of disruption (e.g. still could be queues and waiting time)

4. Improve information provision (e.g. real time information of expected arrival times, reasons for delay, whether time can be recovered in flight. Could also be more general information on on-time performance before booking flight)	
Possible positives	• Reduced stress during disruption • Could lead to more informed choices if provided pre-booking
Possible negatives	• Wouldn't address causes of delays