FROM PASSENGERS TO AIRPORT CUSTOMERS – HOW SHOULD AIRPORTS RELATE TO THEIR TARGET GROUPS?

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Abstract:

Over the last years, airports have changed significantly the way they operate, based on a series of factors, such as the rapid advancement of technology, the security issues, air travel affordability making travel accessible to more people, the emergence of low-cost companies and the changes of the typology of the modern traveller.

The main challenges that modern airports face nowadays are:

- *Very thin margins, which makes revenue from airlines not sufficient to cover the operating costs and determines the airport to concentrate on non-aeronautical revenue. This fact changes the airport from a travel infrastructure to a business on its own and converts the passengers into customers.*
- *Providing improved security in a terrorism-shaken world while still creating a positive passenger experience*
- *The necessity to coordinate the evolution over time of various systems and technology in order to smoothen the airport operations while improving the passenger experience and the revenue of the airport*

The passenger experience has become a significant focus for airports from all over the world. An important step in managing customer expectations is to understand the typology of the modern passengers. The evolution of technology, the rise of internet and social media determined new characteristics of the modern travellers who are becoming more informed, empowered and require personalised services.

The article evaluates the way today's airports relate to the modern passengers, by involving them in different kind of experiences. Several airports are used as case studies.

In the same time, a survey was conducted, focusing on the way passengers in Henri Coanda Airport perceive the characteristics of the perfect modern airport. Based on the results, new directions have been opened for further investigation.

Keywords: airport, passenger, customer service, technology, digital, passenger experience, airport operations, personalized services.

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Introduction

During the last years, the airline industry has had a dynamic evolution, under the influence of several factors such as: the liberalisation of air traffic which contributed to the development of hub and spoke systems from one side, as well as the expansion of low-cost airlines, from the other side; globalization; the evolution of technology; the security issues.

The spread of low-cost carriers contributed to the development of new business models in the airline industry, affecting all the stakeholders involved, including passengers and airports. Firstly, low-cost airlines contributed to the development of regional and secondary airports, which determined a geographical redistribution of air traffic and led to regional economic growth.

Also, low-cost airlines had an impact on all airports, determining them to diversify their sources of revenue. The necessity to lower the airport taxes and the thin margins drove airports to rethink their strategies, focusing on generating revenue from non-aeronautical activities. This represented the first step in the commercialisation and privatisation of airports.

In the same time, ground operations and airport processes have significantly changed for security reasons, following the terrorist attacks. The complexity of the security processes has affected the passenger experience and raised new challenges for airports, such as congestion, fragmentation of processes etc.

Finally, the evolution of technology determined new characteristics of the modern traveller who is more demanding and has different expectations. His interest towards self-service technologies, online applications, use of devices, determined airports to adapt by diversifying the services and facilities offered. From this angle, the use of technology may help airports better manage their operations, if implemented the appropriate way.

In this context, airports started the process of redefining their development strategies, taking into consideration the changes that occurred and the challenges they are confronted to. The passenger represents a central element in this process and understanding his needs and expectations became a main focus of airports.

Literature Review. The Evolution of the Airport Model

During the last decades, airports have been confronted with many changes and encountered different challenges in their evolution from basic infrastructure to "tourist attraction" on their own.

The first major change that occurred was the liberalisation of the airport industry (European Low Fares Airline Association, 2004), as a consequence of the deregulation of air transport, the growing airline competition and the emergence of low-cost airlines.

The cost of the flight ticket became an important issue in the airline industry, affecting in the same time airlines, passengers and airports. The deregulation of the industry, the growing number of passengers, the increase of aircraft capacity and the whole context of globalization represent some of the factors which determined airlines' focus on lowering the fares of the flight tickets. In its reports for 2005 – 2007, the

European Travel Commission recognized low-cost companies as the main drivers of growth in travel and tourism demand (Olipra, 2015). As a consequence, passengers became more price oriented, fact confirmed also by a study conducted by Carstens & Heyns (2012), which indicates that 95% of the travellers for leisure purposes are more conscious of costs (Kamarudin, 2015).

In order to keep the fares low and the profitability high, airlines started to put pressure on airports, forcing them to lower the taxes and the fees.

Also, one of the main characteristics of low-cost airlines is the use of secondary/regional airports. According to Anne Graham, LCC passengers may choose an airport which is a considerable distance from their home to take advantage of low fares (2013). The air fare became an important factor in the airport choice decision, especially for leisure travellers (Paliska et al., 2016). Airports are selected to fit-in with the LCC operating model, with low aeronautical charges and other user costs, or flexibility in negotiating airport charges deals, and with a high utilisation of aircraft with quick turnaround times and reduced congestion (Halpern, Graham, Dennis, 2016).

According to De Neufville (2008), secondary airports compete with the main airports in three ways:

- Being a convenient alternative to a major hub (less expensive services, closer to some areas outside the city)
- Bypassing hubs (less congestion, direct flights)
- Low-cost airlines and low-cost airports created their own parallel network competing with the traditional system and with the major hubs

The new interest towards the use of regional/secondary airports and the requirements imposed by LCC intensified the competition between airports and determined new important changes in their evolution.

First of all, airports started to focus on other means of revenue, which allowed them to maintain profitability in the newly created context. In order to attract LCC, airports, especially secondary airports, were willing to negotiate lower airport charges and compensate by non-aeronautical revenues from the increased number of LCC passengers and their spending (Graham, 2013).

While several researchers (Graham and Dennis, 2007, Njoya and Niemer – 2011, Castillo Manzano - 2010) mentioned that LCC passengers do not spend a lot on commercial facilities, according to Anne Graham, LCC passengers might have a strong demand for F&B facilities (given the limited offer on board, as well as for car parking and car hire, due to the use of more remote secondary airports).

Still, this trend does not affect only airports on which LCC operate. The growing number of LCC determined an increased competition between all airlines, both low cost and traditional, which resulted in lower airfares and, as a consequence, a general growth in passenger numbers. In this context, all airlines were forced to cut cost and operate on limited margins, while regulated aviation charges remained the same (Zenglein, Muller, 2007).

Previously, the main source of revenue that airports had was generated from aeronautical activities. The fact that all airlines started to focus on cutting costs

determined airports to rethink their strategies. As a consequence, finding alternative sources of revenue became an important issue tackled in their development strategies. In the same time, privatization efforts and a decline in state control also represented factors which contributed to airports focusing on other revenue sources, in order to maintain profitability. In this context, non-aviation revenue started to be considered a key figure in many strategic managerial decisions (Zenglein, Muller, 2007).

According to Anne Graham, the evolution of airports consisted of three steps:

- Airport commercialisation corresponding to the adoption of a more business-like management philosophy
- Airport privatisation representing the transfer of the management or the ownership of an airport, being considered commercialisation taken to its limit.
- Airport ownership diversification – the emergence of different types of investors and operators of airports

In the same time, during the last years, the political and social instability have represented challenges for airports worldwide. Starting with the terrorist attacks of 2001, airports, airlines and the international organizations within the aviation industry have continuously tried to improve, in order to ensure both security and functionality in airports.

One of the most important challenges for airports nowadays is represented by the mix of three elements: security, functionality and satisfaction. According to IATA's 2012 Global Passenger Survey, passengers' dissatisfaction in airports is mostly determined by long queuing times at security (37%), by having to remove shoes and belts (21%) or electronic items out of bags (12%)[1]. The more complex the security process became, in the context of an intensifying traffic, both the degree of satisfaction of passengers and the functionality of the airport were affected. According to Martın-Ceja (2006), cited by Arif, Gupta, Williams (2013), a functional airport should minimize the travel time and allow leisure time in the commercial areas of the airport.

Passenger Satisfaction – Important to all Stakeholders Involved

Passenger satisfaction influences both airports and airlines and equally has a strong impact indirectly, affecting the tourism industry and the development of tourist destinations.

First of all, airports play a crucial role within the air transport sector, especially nowadays, when they have multiple functions. Airports assure the necessary infrastructure (runways, taxiways, passenger terminals, apron space, ground transport interchanges and cargo warehouses, as well as services like air traffic control, security, fire and rescue in the airfield or handling services) allowing flights to take off and land and passengers to transfer from surface to air transportation mode (Seyanont, 2011). Airports also consist of a variety of commercial facilities (shops, restaurants, hotels, business centers) (Seyanont, 2011), becoming a „tourist attraction" on their own.

Airports have a strategic importance to the regions they are located in, as they are generators of economic activity, contributing directly through income, employment,

[1]http://www.airport-technology.com/features/featuresecuring-iata-checkpoint-future-biometrics-video/

capital investment and tax revenues. Moreover, due to the rapid expansion of airport-centric commercial development, airports became leading urban growth generators (Kasarda, 2008). According to Kasarda and Lindsay (2012), they may represent a new model of regional economic development „Aerotropolis". Airports are supporting tourism and other sectors, therefore, having an indirect and induced impact on the economy.

In this context, attracting passengers, airlines and, as a consequence, various stakeholders represents an important objective for destinations worldwide.

Airports represent travellers' first point of contact with a foreign country and therefore, are vital in creating the first impression about a country. Airports are also considered a cultural and symbolic gateway to a country (Lohmann & Duval, 2014), therefore they can affect tourists' overall perception of the destination.

In the same time, considering that Ritchie and Crouch (2005) define the travel experience chain as "the entire series of events and/or service transactions that occur from the time the individual/group leave home until they return" (p. 213), airports represent an important part of the travel experience and can contribute to the overall satisfaction or dissatisfaction of the tourist.

Still, the degree of satisfaction of passengers does not only affect the image of the destination and the way it is perceived. Airports can have direct benefits from satisfied passengers.

The evolution of the airport from public utility to commercially oriented business (Graham, 2013) created a more complex relationship between airports and customers. As airports became more dependent on non-aeronautical or commercial revenues, they started to focus more on the needs and the profile of passengers, especially in the context of dealing with a new typology of a modern, better informed and more demanding traveller. Several research studies indicate that prior positive experiences that passengers have may influence consumers' subsequent choices of that airport over others (Bas¸ ar and Bhat, 2004; Hess and Polak, 2005a; Fuellhart, 2007, Marcucci and Gatta, 2012, cited by Paliska et al., 2016). Due to the rise of international air traffic and the growing competition between airlines, the General Assembly of Airports Council International (ACI) concluded that the quality of service at airports is a "vital factor in its own right" (Airports Council International, 2004 cited by Pantouvakis and Renzi, 2016).

Moreover, airport service quality plays nowadays an important factor which contributes to airport competitiveness together with available routes, schedule, location and prices (Pantouvakis and Renzi, 2016).

A study conducted by J.D. Power and Associates shows that passengers with the highest levels of satisfaction with an airport contributed to the increase of the retail spending with 45% (Kamarudin, 2015).

Passenger satisfaction is equally important for airlines, considering that the airport experience is strongly connected with the perception of the services offered by the airline (ex: baggage handling, check-in formalities). In the same time, national airlines strongly depend on the hubs they operate in, therefore, their functionality and security plays an important role in passengers' decision of purchasing the flight ticket.

What do Passengers Expect from a Modern Airport?

Passengers' expectations have changed over the last years, especially in regards to the quality of service. The modern passenger has higher living standards and higher expectations and is looking for „travel experiences", starting from the moment he starts his trip.

The evolution of technology allowed him to be better informed and more demanding in terms of prices and quality of services offered. Regardless of the price paid for the flight tickets, passengers expect the same standard of service at the airport. Moreover, safety is considered a non-negotiable issue (Kamarudin, 2015).

In the same time, nowadays, a new type of passenger category emerged, as a consequence of the evolution of technology and empowered by self-service solutions. Constantly connected to devices (mobile phones, tablets, Ipads), the modern passenger expects easy access to information and often requires the option of self-processing.

Due to privatisation, airports have raised their standards of customer service, and have gained more stakeholders, with increasingly more complex operations (Kamarudin, 2015). Considering that, nowadays, airports have self-service options from the airport operator, the airline or the other stakeholders, it is necessary that all these services are integrated in „a common environment"[1].

Several organizations (Airport Cooperative Research Program (ACRP), ACI World ACRIS (Airport Community Recommended Information Services), have initiated programs focusing on making travel process smoother and easier within airports. They are trying to change the system where each airport transaction takes place in a specific location inside the airport, focusing instead on fewer process areas and more ways of executing these transactions to choose from[2].

Organizations like IATA are focusing on improving security in airports while keeping the airport functional and passengers' satisfaction high. Through IATA's Checkpoint of the Future programme, a differentiated screening system making use of biometrics and passenger data might assure a more efficient and speedy security process[3].

From passenger's point of view, there are two main categories of activities in the airport terminal: process activities, comprising the passenger flow from check-in, security screening until boarding and discretionary activities corresponding to the time spent between the processing points (shop, eat, rest..) (Bezerra and Gomes, 2016).

In previous research studies, passenger perception of quality has been associated with the efficiency of the processes, the functionality of the airport and a positive attitude of the staff (Caves and Pickard, 2000; Fodness and Murray, 2007; Rhoades et al., 2000, cited by Bezerra and Gomes, 2016).

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[1]http://www.barich.net/iOffice/uploads/publications/pdfs/45/originals/Enhancing%20the%20Passenger%20Experience%20through%20IPSS-%20final-webpage%20(1).pdf, accessed on 01.11.2016);
[2]http://www.barich.net/iOffice/uploads/publications/pdfs/45/originals/Enhancing%20the%20Passenger%20Experience%20through%20IPSS-%20final-webpage%20(1).pdf, accessed on 01.11.2016);
[3]http://www.airport-technology.com/features/featuresecuring-iata-checkpoint-future-biometrics-video/.

However, an important challenge that airports encounter is addressing the needs of passengers from many cultures and nationalities, as passengers' perception of service quality might be different depending on their countries of origin (Pantouvakis and Renzi, 2016).

In order to improve passenger satisfaction in airports, it is important to understand the complicated nature of airport services, to identify the quality attributes to be improved and the drivers that lead to users' satisfaction (Pantouvakis and Renzi, 2016).

According to Pantouvakis and Renzi (2016), there are several dimensions considered the best descriptors of airport quality:

- The services cape of the airport (circulation, cleanliness, lighting conditions, congestion level, overall ambiance)
- The signage – availability of signs and displays, guidance for airport facilities
- The service – functionality (efficiency of control inspections and service provision)
- The image of the airport

Recently, airports started implementing self-service technologies in airports, as it increases productivity and efficiency (Dabholkar, 1996;Gelderman, Ghijsen, & van Diemen, 2011; Liljander, Gillberg, Gum-merus, & van Riel, 2006; Meuter, Ostrom, Bitner, & Roundtree,2003, cited in Castillo-Manzano, Lopez-Valpuesta, 2013) and actively involves the passengers, making them „co-producers of the service"(Gelderman et al., 2011, cited in Castillo-Manzano, Lopez-Valpuesta, 2013).

Munich Airport adopted an Easy Pass Automated Border Control, allowing a faster border crossing simply by scanning and matching faces to the ID. In the same time, in order to assist the passengers in the airport, Interactive Info Gate Counters were introduced, offering information, an intelligent navigation solution guide or live chatting with the airport staff.

Geneva Airport also implemented an innovative system in order to optimize traffic within the airport, through an innovative baggage robot, Leo, which collects passengers' baggage before they enter the terminal. Bags are collected, checked in, transported and loaded onto the correct flight without being necessary that the passengers enter the terminal building, which speeds us the bag drop process. The boarding counter is also automated and an airport tablet on wheels robot also guides passengers around the airport.

TigerAir Australia has equipped the airport agents with iPads, allowing staff to roam around the terminal and check-in passengers away from the traditional counter.

Cork Airport was the first airport in the world to partner with Flightradar 24, in order to provide real time flight tracking via its airport app.

In order to understand travelers' preferences regarding the airport experience and the required features of a modern airport, a survey was conducted among passengers having travelled through Henri Coanda Airport. The questionnaires were randomly administered among travelers at the airport and online. One hundred fifty persons were interviewed, out of which, 62% women and 38% men. 16% of them were 25 years old or under, 40% between 26 and 35 years old, 14% between 36 and 45 years old, 16%

between 46 and 55 and 14% over 56 years old. Among them, 38% usually travel by plane 3 or 4 times per year, 36% 2 times or less and 26% more than 5 times.

Results and Discussion

A majority of the respondents (73.5%) indicated that their decision of choosing an airport is not related to its location in/outside the city, but with its accessibility. This high percentage is a consequence of the expansion of low-cost airlines over secondary airports, which became an attractive alternative to main airports, being well connected to the city and less congested in the same time.

Also, most of the interviewed passengers (82%) considered that the most important aspect of an airport's design is its functionality. Before being interested by the different facilities and services offered by the airport, travellers are looking for a pleasant airport transit experience. Functionality represents the foundation for further development of airports and diversification of services. Moreover, as the facilities and services offered are becoming more complex and the number of stakeholders increases, the functionality of the airport needs to be improved, for a smooth travel experience.

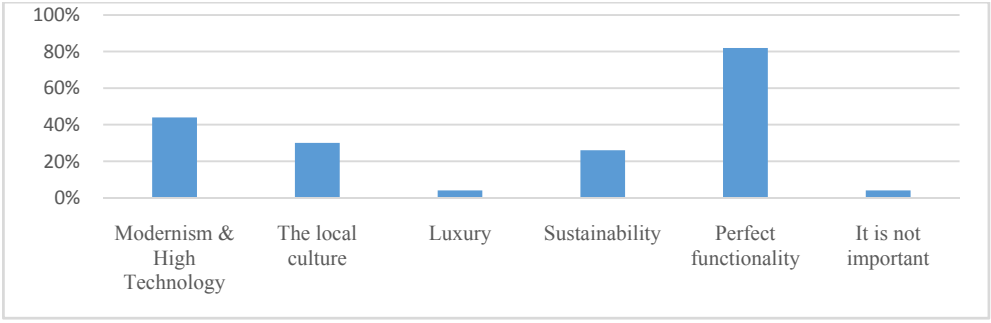

Figure 1: What should the airport design reflect?
Source: created by authors

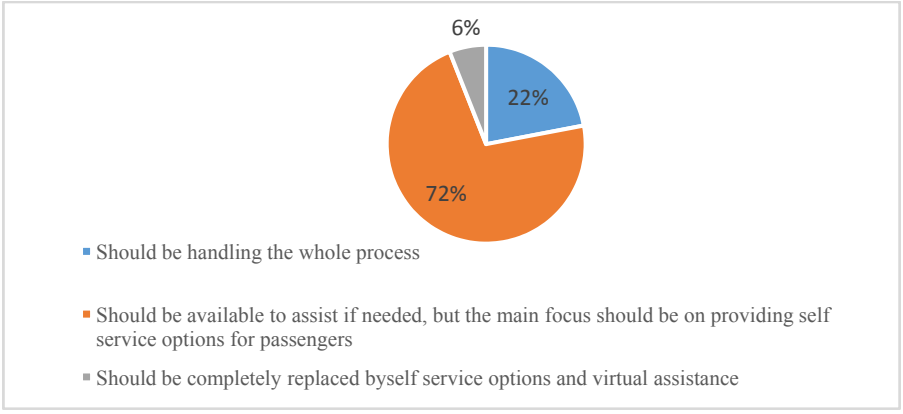

Figure 2: The airport staff
Source: created by authors

72% of the respondents considered that the modern airport should rely on self-service technologies for the airport operations, with staff's assistance still being available – if needed. Considering that one of the main characteristics of airports should be functionality, self-service technologies could help by improving the management of passenger traffic. In the same time, the modern traveller, always connected and with access to several portable devices, feels comfortable having some control over the processes and handling some of the airport operations on his own.

The fact that 64 % of the passengers admitted checking-in online before the flight, regardless of the type of airline they fly with (low cost/ traditional), can reflect that modern passengers are switching to self-service and mobile options and airports should be able to adjust to this new trend.

Also, 88% of the passengers admit using their mobile phone while being in the airport. This creates new opportunities for airports, giving them the possibility to easily offer personalized services but also useful information. The modern passenger is always connected, has access to information using online channels, therefore, the key to attract him is through virtual interaction. In the same time, his online presence can give useful information on his preferences, interests and habits, allowing airports to better understand his needs and respond by offering the desired service, at the right time.

While 26% of the interviewed travellers would like to receive on their devices information regarding the destination of their trip, 92% are interested in being notified of any flight changes or gate updates. During their transit at the airport, passengers are mainly looking for a steady experience, avoiding the stress of not being in time for their flight or wandering around the airport looking for their gate. Being constantly updated on their devices of their flight details, their travel experience will be seamless, they will be more relaxed and allocate more time to other activities in the terminal, including shopping or discovering some new facilities.

When being asked to indicate the most stressful part of the airport experience, 68% of the respondents mentioned the queues at security, 44% the queues at the check-in counter, while 28% consider that the repetitive process of having the documents controlled and the security control itself (26%) represent some of the least pleasant parts of the airport experience. The modern traveller is more time conscious, therefore, waiting at queues or going through repetitive processes can have a negative impact on his experience. In the same time, the increasing number of flights and passengers, as well as the complexity of the security measures have led to airport congestion, affecting operations and processes. In this context, airports started focusing on addressing these challenges, in order to enhance the passenger experience and reduce the stressful parts. 90% of the passengers responding to the survey consider that airports could enhance the passenger experience by improving their functionality (reducing waiting times and managing passenger flow).

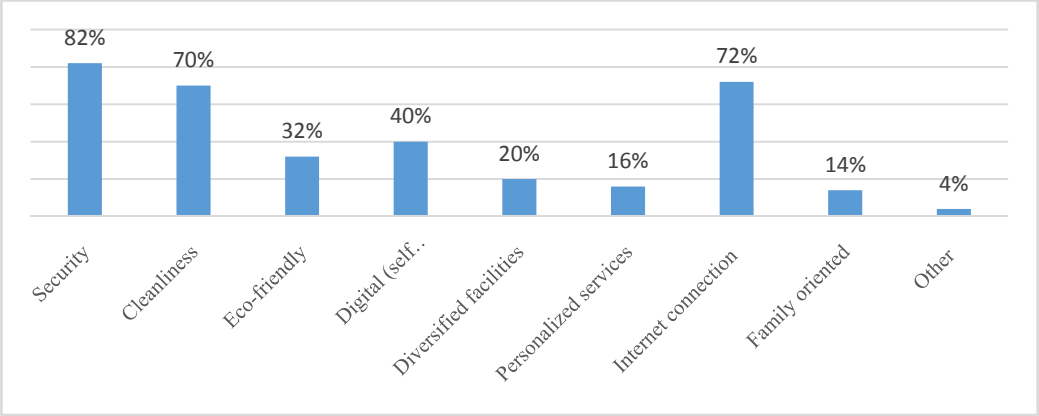

Figure 3: Which are the main characteristics that a modern airport should have?
Source: created by authors

The most stressful part of the airport experience is represented by the queues and the security process, which means that, before diversifying the services offered, it is important that airports focus on optimizing passenger traffic while keeping a high security level. A majority of the passengers consider that the main characteristic of an airport should be security (82%), but also cleanliness (70%). 72% of the travellers consider that a modern airport should also offer internet connection. This allows them to be constantly connected through their devices, having in the same time the possibility to access different online services offered by the airport.

Conclusion

As the airline industry started to change, especially following the expansion of low-cost airlines and the development of new business models, airports were forced to adapt to this new context. The new airport development strategies focused on adopting business oriented approaches and gaining profit, by diversifying the revenue. The key element in this strategy was the traveller, who changed his position, from passenger to customer of the airport. In this context, understanding the typology of the modern passenger and his needs, while properly managing the security and airport operations, became the main focus of airports nowadays.

Moreover, low-cost airlines contributed to the development of regional and secondary airports, which led to an increasing pressure on airports and stimulated competition. As a consequence, passengers started to have more options than before and became more demanding. From this angle, airports had to become innovative, improve the quality of service and diversify the facilities offered, in order to enhance the passenger experience and attract travellers.

Security and functionality remain the main characteristics of an airport that travellers require. Therefore, in order to create a pleasant environment, allowing the traveller to have an agreeable experience and spend money using the airports' facilities, it is mandatory for airports to properly coordinate the airport operations and optimize traffic.

Technology is another aspect that needs to be taken into account, considering that many passengers are already using self-service technologies and that this option could represent a solution for the current challenges that airports face, such as congestion, security risks, fragmentation of processes.

If imagining a version of Maslow's Hierarchy of Needs, adapted for airports, security and functionality could be the basis, followed by technology and the facilities offered:

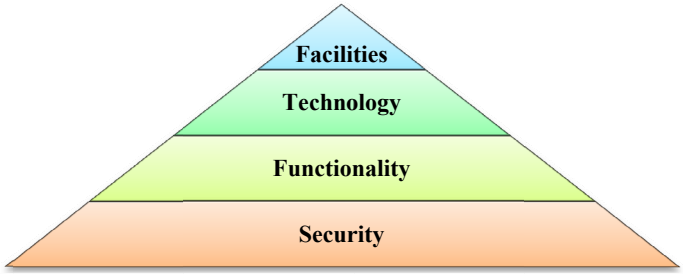

Figure 4: The Maslow's Hierarchy of Needs, adapted for airports

Further research (on a wider level) can confirm or infirm this hypothesis, along with the correlation between passengers' perception of how a modern airport should be (the facilities it should offer) and the following elements: the degree of development of airports (especially their functionality and security level) and passengers' personal experience, their culture and the airports they are used to transit.

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