Heathrow

Terminal 2 | The Queen's

OPEN TO ALL:

Improving air travel for
passengers who require support

REVEALING REALITY

This document outlines the findings of a research study independently conducted by **Revealing Reality,** commissioned by **Heathrow Airport.**

ACKNOWLEDGEMENTS

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FOREWORD

Giving our passengers the best airport service in the world

Heathrow is the UK's hub airport and our nation's front door, connecting all of Britain to global growth. Our vision is to give our passengers the best airport service in the world.

This means we must aim to give every passenger on every journey great service. This is never more important than with those passengers who expect and require additional services to support a smooth journey through our airport – whether through assisted mobility, hidden disability awareness, care for medical devices or a friendly and knowledgeable escort to help reduce the anxiety of making a travel connection.

To achieve this ambition we need to provide a welcoming and accessible airport that ensures all passengers can travel through Heathrow in the way that they choose, with the care and dignity they expect.

We understand our passengers have choice and we want them to choose Heathrow because we consistently deliver on, and on occasion exceed, their expectations.

From the smallest detail to the largest system we should strive to design our services and processes with the passenger in mind.

Our purpose at Heathrow is 'Making every journey better' and it requires a continuous improvement mindset. This document is therefore the starting point, not the end, and I urge you to take time to review it and to incorporate the thinking into your work.

Emma Gilthorpe
Chief Operating Officer
January 2021

EXECUTIVE SUMMARY

The ambition of Heathrow is to enable each and every passenger to receive great service whilst at the airport. Ensuring people requiring support can engage with and have a positive experience within the airport is key – especially in light of COVID-19.

However, until now Heathrow has only had access to relatively limited data on passengers with personal circumstances moving through the airport environment, relying heavily on IATA codes shared by airlines.

This research project was commissioned to fill the organisational knowledge gap and support Heathrow to develop and improve their accessibility strategy. The research employed a large-scale, mixed-method approach, bringing together qualitative and quantitative research and incorporating the views of 11,400 consumers - both before and during the COVID-19 pandemic. It is the largest of its size ever published on this topic within the aviation industry.

The research project aimed to explore needs of customers beyond those with long term physical disabilities, taking instead a much broader focus that includes illness, mental health, fluctuating and temporary conditions. This report refers to '**personal circumstances'** to encompass the wide range of situations experienced by customers.

Language used in this report

Finding the correct language to use to describe consumers, their situations and needs within this work has been very challenging. The principle reason is that the report aims to include and incorporate a broad range of situations and experiences – including illness, physical disability, mental health, cognitive disabilities, and beyond. In addition to this, it is important to talk about consumers in line with the social model of disability, without labelling people as 'unable' but recognising that the environment they are in can be disabling.

There is no easy or obvious answer. It has involved significant debate, conversations with experts in a range of fields and wide-spanning reading.

Within this work, we have settled on, for the time being, the description of personal circumstances. This describes the circumstances that a person can find themselves in, be it more permanent or more temporary. It is not a description of a person themselves. It is flexible and covers a wide range of situations.

Who requires additional support with their airport experience?

This research has demonstrated that both a large number and broad range of people travelling through airports have personal circumstances that impact their experiences and needs.

In 2019, pre-COVID-19, two thirds (67%) of recent flyers in our survey of the UK general public reported at least one personal circumstance (permanent or temporary) that could impact their airport experience negatively[1].

The diversity of personal circumstances is complex. Consumers can be grouped into five core categories, enabling Heathrow to build a unified accessibility strategy around them. They are:

- Consumers with **physical personal circumstances,** such as IBS, arthritis, pregnancy or broken bones

- Consumers with **sensory personal circumstances,** such as visual and hearing impairments or migraines

- Consumers with **cognitive personal circumstances**, such as autism, dyslexia, or experiencing jetlag

- Consumers with **psychological personal circumstances,** such as bipolar, stress or anxiety

- Consumers with **cultural personal circumstances,** such as requirements around clothing, food or religion.

Within these groups, there are consumers who have more permanent personal circumstances and those with more temporary or fluctuating circumstances.

These groups challenge industry conventions around the way PRMs are thought and talked about. In fact, the survey with the general public showed that for consumers who fly regularly ("in the past year" at the time of the survey), just as many reported a frequent/permanent psychological need (24%) as those with a physical need (23%)[2].

There is also a group of *potential* consumers: those who are not currently flying because of their personal circumstances or how they perceive they would be treated within an airport environment. While some challenges are beyond the control of Heathrow, there are improvements that can be made to help a wider group of people feel at ease coming through, spending money in and enjoying their airport experience.

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1   *Base n=1900 members general public, flown in last year (at time of the survey)*
2   *Base n=1900 members general public, flown in last year (at time of the survey)*

What do these consumers need?

While security is often talked about as a challenging part of the process for many, there are opportunities for improvement from the moment a consumer leaves their home or hotel; through to their arrival at their destination; and back again.

Navin[3], 28, has a visual impairment. While travelling on holiday he couldn't find his way from the taxi drop-off to the check-in desk or Assistance Service without the help of other passengers. Similarly, Ahmed, 76, a diabetic, brought his own sandwiches to eat while waiting in the Assistance Service: he didn't expect to be able to go to the shops and was worried about his blood sugar levels during the wait.

COVID-19 has increased concerns about travelling for some of the consumers and reluctant flyers within this research. Navin relies heavily on touch as a means to interact with people and navigate different environments. His inability to touch things in the same way in the current context causes him a great deal of anxiety. For others, there were concerns about how social distancing would be enforced in the busier parts of the airport where queueing is necessary, such as security and passport control.

The complexity of improving customer experience throughout the airport is compounded when you need to bear in mind so many different groups and their personal circumstances at different stages of the journey. However, there are some fundamental needs that span across consumers and can guide how to improve the journey:

To trust – People need to trust that they will be supported during their time at the airport and that they will be able to navigate the airport easily.

To choose – People need support to maintain their independence as much as possible and to choose what is comfortable for them.

To enjoy – People need to be empowered to enjoy their experiences within the airport, and make the most of the shops, restaurants and other commercial offers.

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3   All names used in this report are pseudonyms to protect respondent anonymity

What can be done to improve the experience?

There is a great opportunity for the aviation industry to improve the current approach to accessibility and thereby enable all consumers and potential consumers, to fully use and enjoy the airport.

It is not easy to get right. There is not one simple solution or silver bullet.

The first step is a shift in mindset beyond the simple categorisation of PRMs, to see and understand the wider groups of consumers requiring support. Some steps have been taken to help people with hidden disabilities, including the sunflower lanyard scheme. However, much more could be done for those with physical, psychological, cognitive, sensory and cultural personal circumstances.

To do this, Heathrow needs more granular data and closer relationships with the passengers moving through the airport. There are limited mechanisms for Heathrow to understand who might require support and this principally relies on data sharing from the airlines. Thinking about consumers more as *individuals* with careful attention to their emotional wellbeing, can improve the experience as well as providing commercial gains.

More specific solutions will no doubt require collaboration and agreement with the wider Heathrow community. Working with the breadth of the community to develop solutions that span the passenger journey, based on evidence rather than on assumptions, could lead to great leaps forward in delivering a great experience for all passengers.

Introduction

Air travel can be stressful for anyone – there are lots of uncertainties and non-negotiable deadlines. There can be traffic or train delays to contend with just to reach the airport. Unpredictable queues at security or passport control that might require a short jog to your gate for your flight or connection.

Add into this a challenging personal circumstance – be it permanent or temporary, visible or 'hidden' – and further stress or practical difficulties can easily come to light. Air travel can become even more worrisome and difficult – to a point where some avoid air travel altogether.

The world is changing; air travel needs to change too

The World Health Organisation estimates that more than a billion people worldwide, or 15 percent of the global population, live with some form of disability (2011 figures)[4]. In England, approximately 26 million people, or 40% of the population, have at least one long term condition (LTC), with 10 million having two or more[5]. DWP figures from 2018/19 show that 44% of pension age people have a disability, 19% of working age people and 8% children in the UK are disabled[6].

In the aviation industry, there were a record number of 3.7 million requests for assistance at UK airports between April 2018 and 31 March 2019 – a rise of over 80 per cent since 2010[7].

Within this context, there is a widely held understanding that a social model of disability should be used, which focuses on the ways in which people are excluded from participation in society as a result of their situation. It posits that people are disabled by barriers within society rather than their individual limitations being 'disabilities' unto themselves.

Barriers to participation constitute the physical – buildings not having accessible toilets, for instance – and attitudinal: for example, public assumptions that disabled people can't do certain things.[8]

There has been increasing focus on improving policy around disability and a recognition of the need to ensure environments (whether physical or digital) are made as accessible as possible. The aviation sector is no exception – the Civil Aviation Authority has highlighted the need for airports to better cater for people with disabilities[9] throughout their airport journey.

4   https://www.who.int/disabilities/world_report/2011/report.pdf (pg7)
5   https://psnc.org.uk/wp-content/uploads/2018/02/Infographic-FINAL.pdf
6   https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/812722/dwp-annual-report-and-accounts-2018-2019.pdf
7   https://www.caa.co.uk/News/UK-Civil-Aviation-Authority-reports-on-disabled-access-at-UK-airports/
8   https://www.scope.org.uk/about-us/social-model-of-disability/
9   Civil Aviation Authority: guidance for airports on providing assistance to people with hidden disabilities, 2016

Heathrow's ambition is to deliver a world-class experience for all consumers

The ambition of Heathrow is to enable each and every passenger to have a world-class experience. Ensuring consumers with personal circumstances can engage with and have a positive experience within the airport is key – especially in light of COVID-19.

However, until now Heathrow has only had access to limited data on passengers with personal circumstances moving through the airport environment, generally relying on IATA codes shared by airlines in advance of the flight.

This research project was commissioned to fill the organisational knowledge gap, support Heathrow to develop and improve their accessibility strategy, and contribute to the conversation about accessibility within the wider aviation sector. The research explored multiple questions including:

- How can Heathrow enable more people who require extra support to travel through airports?

- How can Heathrow support them better while they're in their care?

- How can Heathrow ensure support is also of commercial benefit?

An innovative, large-scale, mixed-method approach

The study was one of the largest of its kind[10] in understanding accessibility requirements of consumers travelling through airports. In the early stages of this work, a wide range of charities and stakeholders from within the aviation community were engaged alongside existing data or insight on the personal circumstances of different audiences within the airport.

This research captured the views of 11,400 Heathrow consumers and potential future consumers from all across the world, alongside approximately 150 staff working within Heathrow Airport and 60 internal and external stakeholder groups. An enormous range of experiences were captured, spanning different consumer types (including non-travellers), those using the assistance programme, and a wide range of personal circumstances.

The core elements of the approach were:

- **A comprehensive literature review:** Synthesising best practice in terms of inclusive design in airport, travel and wider environments. The review covered three key areas: accessibility in general, key challenges faced by those with different accessibility needs, and a summary of good practice and inspiration. The review consulted sources such as academic literature, legislation and policy – including specific policies in place for the aviation industry, prevalence statistics from the World Health Organisation and charitable bodies, and principles of universal design and how these have been applied in other contexts.

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10 The literature review did not reveal evidence of larger studies covering the same issues.

- **A range of stakeholder engagement exercises:** Including representatives from the airport community and beyond. Through a series of workshops, expert interviews and attending accessibility events, we engaged:

  » 45+ stakeholders from the airport community, including the CAA, the Consumer Challenge Board (CCB) and Heathrow Access Advisory Group (HAAG), Airline Operators' Committee (AOC), as well as airlines, Border Force, Omniserv, Heathrow Express (HEX), volunteers and ambassadors for those with disabilities.

  » 18 charitable organisations who represent those who face challenges with airport travel, including Queen Elizabeth's Foundation for Disabled People, Stroke Association, Versus Arthritis, Mind, and Colostomy UK.

- **Qualitative fieldwork in the airport environment and beyond:** We used innovative techniques to capture observational data alongside the views of staff, consumers and potential-future consumers:

  » Over 80 hours of in-airport observation, spanning all stages of the passenger journey. Researchers conducted intercept interviews with over 300 passengers and staff, additionally capturing observational data and visual assets.

  » 32 shadowed journeys – following the end-to-end journey experience of 32 passengers through shadowing and video diaries, as they travelled from home and through the airport.

  » 12 in-depth interviews with reluctant flyers, understanding a wide range of barriers to travelling via the airport.

- **Quantitative fieldwork** to map the scale of issues faced in the airport environment with the general public, including:

  » A general public survey, capturing 3019 responses from a representative range of UK adults, aged 18+[11].

  » An in-airport survey, capturing 8113 responses from a representative spread of Heathrow Airport passengers by demographics. This was a 5-minute survey conducted at the departure gate or arrivals hall, translated into multiple languages[12]

  » A follow-up survey, with some of those who completed the in-airport survey. This survey captured data from 1,502 people.[13]

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11 This survey was conducted in partnership with Populus
12 This survey, and the follow-up survey, was conducted in partnership with Epinion
13 85% of people agreed to be re-contacted. Open-rate for email invites was 31% with a final response rate of 22%, capturing insight from 679 from arrivals and 823 from departures.

Several critical lessons were learned about how to research this area through the course of this work. Most importantly, it is widely recognised that many passengers who could have benefited from additional support from Heathrow often didn't consider themselves 'disabled' or 'disabled enough' to require help. This meant that some did not consider the types of assistance on offer relevant to them or were not forthcoming about their challenges to staff who might have been able to help. In addition, some struggled to articulate their own needs in a clear and coherent way, which meant observation and systematic analysis were required to clarify consumer need.

Further, when asked to imagine improvements to any part of their experience, they most often focused on specific services, such as the Assistance Service, even if they didn't use it, or want to use it, themselves.

Finally, there were moments within the passenger journey that could easily dominate narratives about problems and needs – in particular, security. However, with a more systematic approach to research design, fieldwork and analysis, it was clear that this wasn't the only part of the experience that could benefit from improvement.

How to engage with this report

This report sets out what Heathrow have learned about consumers' support needs throughout the airport journey and what opportunities exist to ensure these needs are being met.

Principally, it sets out the following:

- The consumers: shining a light on which consumers have needs that are not yet being met

- Their needs: explaining how we can more clearly understand challenges in the airport journey and where needs are not being met

- Opportunities for improvement: outlining what Heathrow, and the industry as a whole, can do to improve the experience for these consumers

Enabling everyone to feel confident in the airport

The ambition of Heathrow is to enable each and every passenger to have a world-class experience. However, there is a gap in provision for those requiring additional support.

In 2019, pre-COVID-19, two thirds (67%) of recent flyers in our survey of the UK general public reported at least one personal circumstance (permanent or temporary) that could impact their airport experience negatively[14]. However, the Heathrow Assistance Service currently only caters for a smaller proportion of consumers.

This means a sizeable proportion of people (those two thirds with personal circumstances who are not catered to by the Heathrow Assistance Service) are using Heathrow Airport without any acknowledgement that they may need extra support. For many of these, and their travel companions, the airport environment will be a negative and challenging experience – something they struggle through – meaning Heathrow is not fulfilling its ambition to deliver a great experience for all passengers.

This is not just a challenge for Heathrow. Worldwide, figures show that there were 4.54 billion scheduled passengers in 2019[15]. How many of these had personal circumstances or needs that weren't acknowledged or met?

14   *Base n=1900 members general public, flown in last year (at time of the survey)*
15   https://www.statista.com/statistics/564717/airline-industry-passenger-traffic-globally/

Physical accessibility requirements are just one part of a much bigger picture

Among these people, there is a wide diversity of personal circumstances.

These circumstances fall into five broad categories[16] – physical, sensory, cognitive, psychological, and culture & identity. The aviation industry has traditionally focused on people with physical personal circumstances. However, this research shows that those experiencing *psychological or cognitive* challenges made up 75% of flyers with a temporary or permanent personal circumstance[17].

The over-focus on those with physical requirements is, in part, due to the language used in booking systems across the airport and airline industry to describe those with personal circumstances. Across the wider world, and the aviation industry in particular, there is currently significant focus in accessibility work on 'PRM's'. Although the legal definition of PRM encompasses a broader range than simply 'restricted mobility', including all types of disability, the wording and acronym 'PRM' is limiting in its emphasis on 'mobility' and potentially holding the industry back from embracing the scale of the issue. Similarly, the IATA codes (International Air Transport Association airport codes) used in the industry to divide passengers into specific groups are all centred around physical limitations, which miss a broader range of issues. From policy to practice, these language and categorisation systems are embedded in the way staff talk about accessibility, meaning many see their role as primarily assisting those with physical requirements.

There has been some progress in this area, with more discussion around hidden disabilities and a growing awareness that there are other types of support needed – such as with the introduction of the Sunflower Lanyard. However, in order to continue to progress, there needs to be a fundamental mindset shift in the way accessibility is thought about and talked about. Staff don't currently have a language or shared framework to work with.
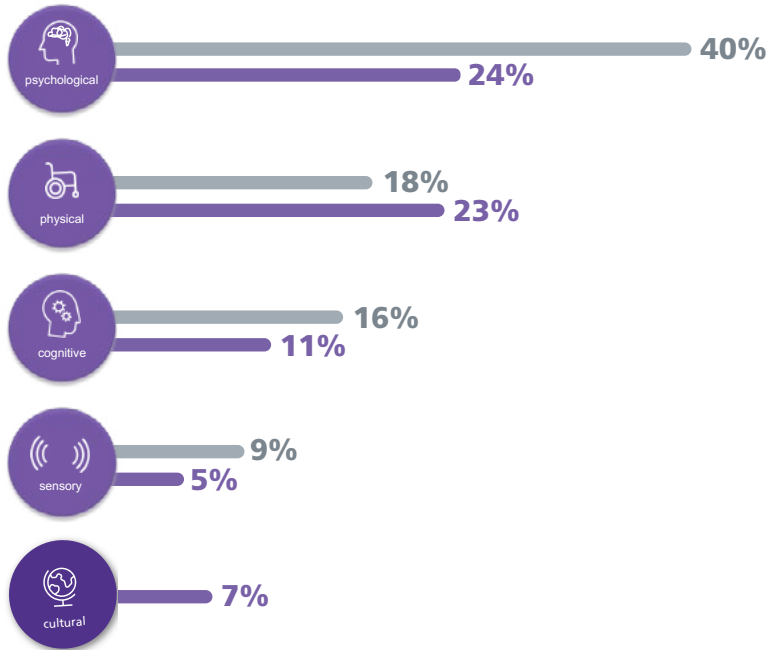

16   These categories have helped Heathrow make sense of their consumer base but are by no means definitive. The language can no doubt be improved. There are cross-overs between categories and many consumers can fit into more than one.

17   Base: n=1616 members of general public who have flown since 2015 and have at least one issue/condition/personal circumstance.

Figure 1: Prevalence of different issues/conditions/personal circumstances among recent flyers and those who have never flown/not flown since 2015[18]

Temporary
Frequent / permanent

RECENT FLYERS (IN PAST YEAR)

psychological — 40% / 24%

physical — 18% / 23%

cognitive — 16% / 11%

sensory — 9% / 5%

cultural — 7%

NEVER FLOWN / NOT SINCE 2015

psychological — 37% / 30%

physical — 16% / 39%

cognitive — 12% / 16%

sensory — 8% / 7%

cultural — 5%

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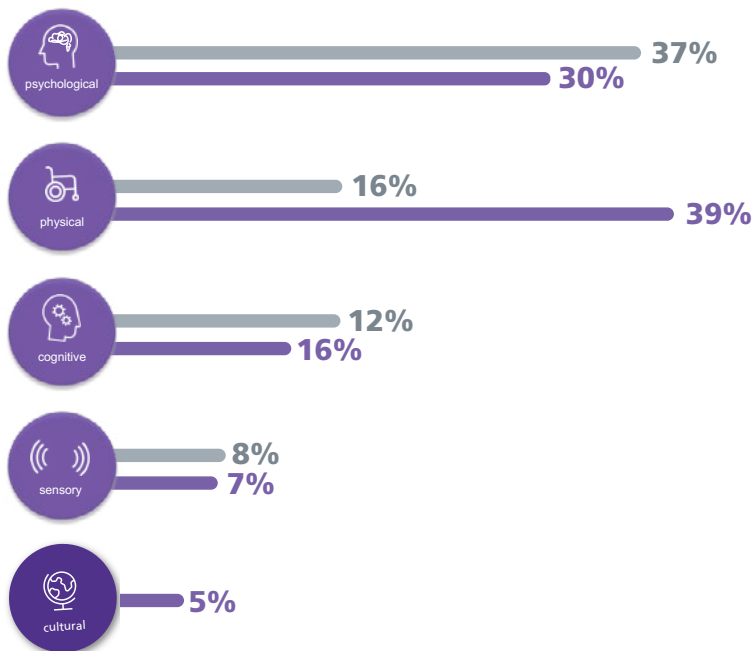
18   Data from general public survey, in-airport survey, and follow-up survey.

Within these five categories, circumstances vary widely – some may have permanent, fluctuating or temporary challenges. Nonetheless, all these have the potential to impact an individual's experience in the airport. Specific personal circumstances within the categories can include:

Type of need (%[19] of flyers (flown since 2015) in the general public surveyed)	Permanent personal circumstances (Kind of need reported in surveys)	Temporary personal circumstances (Kind of need reported in surveys)
Psychological 49% flyers	• Abnormal sleep / insomnia • Anxiety / stress • Depression	• Fear of flying / claustrophobic
Cognitive 36% of flyers	• Autism / ADHD • Dyslexia / dyspraxia • Memory issues	• Tired / exhausted • Confusion
Physical 24% of flyers	• Mobility issues / joint pain • Conditions affecting breathing • Diabetes	• Travel sickness • Recovering from surgery
Sensory 13% of flyers	• Hearing issues • Poor equilibrium / balance • Visual impairment	• Blocked sinuses / cold / cough • Headache
Cultural & identity 6% of flyers	• Dietary or religious requirements	• Needs around language, clothing, privacy

19   Base: n=2,355 members of general public who have flown at least once since 2015

What does this mean for individual consumers?

Psychological personal circumstances were the most common. Many are struggling with stress and anxiety which is amplified in the airport, owing to the stress of time-pressure and an unfamiliar environment. One such example was, Janet, 69, said she became so anxious around the unpredictability in airports she became physically sick, describing them as 'like big cities' that were hard to get around.

Cognitive personal circumstances were the second biggest category of need – with many consumers reporting it was a challenge to process information in the airport environment. Many felt rushed or unclear when navigating through. For example, Jess, a 25-year-old with bipolar disorder reported that much of the airport environment felt like an 'assault on the senses'.

Physical personal circumstances came in many different forms for consumers. For some consumers, visibly requiring a wheelchair meant that their needs were evident to others. However, for others, such as Fiona, 48, travelling with a prosthetic leg, it could feel stressful that no one suspected she might need extra time or support to manage her journey.

Sensory personal circumstances were slightly less common but could cause major impacts for consumers in the airport environment. For example, Stanley, 48, was a reluctant flyer, owing to the fact that he was blind. He felt the idea of being in an airport was stressful but didn't want to have to rely entirely on others to help him through.

Cultural personal circumstances could be frustrating for some consumers. For example, Amira, 38, a connecting traveller from India, felt anxious on her way to security because she did not want to take off items of clothing for religious reasons.

The wide scope of all the personal circumstances that could be experienced at any one time are a significant challenge. However, that does not mean progress is impossible – there are clear areas where improvements can be made.

Those with personal circumstances were more likely to feel negative emotions, and were not supported to spend money on things they enjoyed in the airport

The research found that in 2019, pre-COVID-19, passengers with personal circumstances were more likely to feel negative emotions while in an airport compared to others. Those relying on additional support also reported negative emotions, showing that even where provision is available, there are still issues causing distress for people with underlying challenges. 76-year-old Ahmed was an example. He was left confused and worried from the Assistance Service he received. Travelling with high blood pressure, and worrying about managing his diabetes, he repeatedly asked staff for further information on the details of his flight. He felt the staff were not forthcoming and he was anxious he would miss it.

Not only are passengers with personal circumstances more likely to feel highly negative emotions, but they also do not feel they are able to make the most of their time in airports compared to other passengers. For instance, 52%[20] of recent flyers (flown in past year) who do not report any permanent or temporary personal circumstances felt they were able to enjoy themselves and use their time well in airports. This falls to just 29%[21] among those with a permanent or temporary personal circumstance.

These figures show that, as well as ensuring all passengers have a positive experience, there is a significant commercial opportunity related to those with personal circumstances.

Some reported not being able to access food or drink, finding it hard to relax, feeling that everything was just mundane, and not being able to buy what they wanted/needed from shops. Some using the Assistance Service felt they were unable to leave the host area to enjoy the commercial offering in departures and were over-reliant on being escorted around by staff. Many consumers using the Assistance Service indicated they would like to have the freedom to browse duty free or the shopping areas, but felt this was not encouraged or made convenient for them.

There is an untapped market of potential consumers who avoid flying altogether

Within our general public survey, data showed that over a third of people (37%[22]) had not flown within the last year, if ever, up to April 2019.

8% said that their personal circumstances made going through any airport unpleasant or difficult – and for 3%, the challenges posed by their personal circumstance was the most important factor preventing them from travelling by air.

Of course, many of the reasons potential consumers aren't using airports are outside the control of Heathrow – for example personal finance situations. However, there are potential gains to be made in addressing potential consumers' concerns about their time in the airport.

When asked about the likelihood they would fly from Heathrow Airport if it better catered for the problems and challenges they faced, 13%[23] of consumers who had never flown but had personal circumstances that could be easily alleviated claimed that they definitely would, with a further 18% considering it. These groups combined equate to 7% of UK adults in total saying that they would be more likely to use an airport if the challenges they face in the airport could be reduced – clearly a notable opportunity for the aviation industry.

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20 Base: n=609 members of the general public who have flown in the past year and report experiencing no issues
21 Base: n=1291 members of the general public who have flown in the past year and report experiencing at least one permanent or temporary issue
22 Base: n=3019, general public survey
23 Base: n=653, never flown and citing potentially solvable issues, general public survey

Developing an end-to-end, world-class passenger journey

There was no one part of the passenger journey, through departures and arrivals, that *couldn't* be improved for those with personal circumstances.

Security is commonly talked about – by both consumers and staff – but this is not the only journey stage where needs could be better met. In fact, for most with challenging personal circumstances, security is just one small part of a much broader mission.

What's more, having a bad experience at one stage can impact passengers' mood and ability to process information at later stages – and colour their overall reflections of the experience at airports. For this reason, it is essential to consider each stage in detail, and identify where improvements could make most impact.

Customer Journey

Planning journey — **Travelling to the airport** — **Check in** — **Security** — **Departures** — **Gate** — **Flight** — **Connections** — **Passport control** — **Baggage reclaim** — **Arrival hall** — **Onward journey** — **Arrive at final destination**
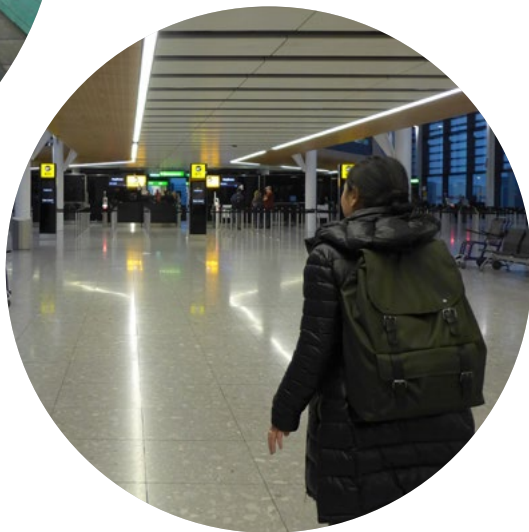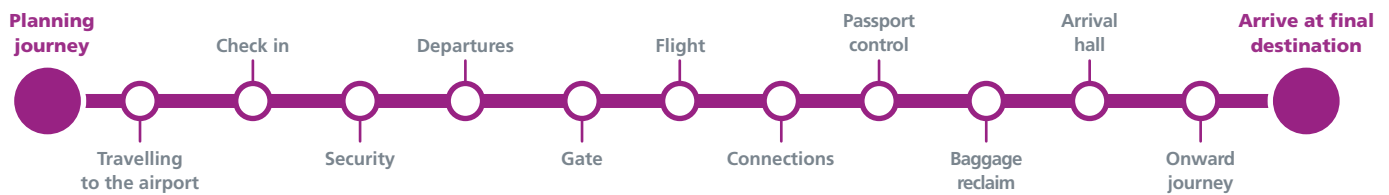
Example challenges

Planning journey
- » All groups: Struggle to specify the type of assistance they require – especially if they have fluctuating conditions
- » Physical: Consumers with medication worry about how to transport it safely
- » Sensory / cognitive: Difficulties booking travel online and need help from others

Travelling to the airport
- » Psychological: Delayed transport causes stress and anxiety

Check in
- » Sensory: Feel overwhelmed by background noise
- » All groups: Don't feel like the Assistance Service is for 'people like them'
- » Psychological: Stressed when they felt they could not communicate clearly with staff at the desks, or use the self-check-ins correctly

Security
- » Cultural: Experience anxiety about needing to remove clothing
- » Physical: Queues are challenging when consumers have bowel issues or fatigue

Departures
- » Physical: Face difficulties finding a quiet place to rest with fatigue
- » Cognitive: Lights and sounds in the shopping area are overwhelming

Gate
- » Sensory: Challenging to read all the boards to find the right gate
- » Physical: Worry about how far the gate will be and their pace in reaching it

Flight
- » Physical and sensory: Assistance users worry about when they will be allowed to disembark the plane and the impact that will have on their onward journey

Connections
- » Psychological: Worry about whether the Assistance Service will move them to their next flight on time
- » Cognitive: Tiredness from long-haul flights makes navigation and sign-following harder

Passport control
- » Psychological: Anxiety about being separated from co-travellers through immigration

Baggage reclaim
- » Physical: Find nowhere to sit
- » Sensory: Struggle to locate the correct area to collect baggage from

Arrival hall
- » Psychological: Worry about finding a place to meet relatives

Onward journey
- » Cognitive: Exhaustion after flight makes it harder to locate public transport

Arrive at final destination

COVID-19 has exacerbated some of the challenges in the airport

Since COVID-19 started to impact daily life earlier this year, some of Heathrow Airport's current and potential consumers with challenging personal circumstances have been shielding or maintaining social distancing. While each has slightly different concerns in relation to the virus, there are several common themes in terms of their concerns about visiting Heathrow Airport:

- They felt unclear how airports, including Heathrow Airport, were managing the pandemic and what processes were in place to enable social distancing.

- Some were concerned about wearing a mask for a long period of time while travelling – in particular for those with anxiety, who felt it would exacerbate their mental health challenges

- Many expressed a desire for reassurance that the airport is being regularly cleaned and social distancing being explicitly enforced

- Some were concerned about the need for 'touch', of their bodies or personal items, within the airport – recognising that this would happen at a large scale (e.g. everyone's belongings at security, everyone's passports)

Meeting needs throughout the journey

The complexity of improving the experience throughout the airport is compounded when you need to bear in mind the five core groups and the 'pain points' that consumers experience at each stage of the journey.

However, there are some fundamental needs that span across consumers and can guide how to improve the journey.

to trust

to choose

to enjoy

People need to trust that they will be supported during their time at the airport and that they will be able to navigate the airport easily

People need support to maintain their independence as much as possible and to choose what is comfortable for them

People need to be empowered to enjoy their experiences within the airport, and make the most of the shops, restaurants and other commercial offers

To trust

"When I go to the airport I feel like I am preparing for battle"

Megan, 37,
Physical personal circumstances

Megan is not alone. 65% of consumers who had flown in the past year expected the airport to be a battle that they needed to prepare themselves for[24]. Those with challenging personal circumstances need to trust that they will be supported during their time in the airport and that they will be able to navigate the airport easily.

They want to know that the systems and staff understand their needs – that they won't be made to feel embarrassed or ashamed, that there will be appropriate support if and when they need it and that they will be taken seriously and treated as a 'human'. But Megan, who lives with diabetes, starts to feel anxious about how the staff will react to her insulin pump at security from the moment she leaves the house.

"I don't feel like the staff are on my side"

Janet, 60,
Cognitive personal circumstances

Janet, 60, was a connecting passenger from Australia but lost her husband at immigration. She was waiting in arrivals for over an hour getting increasingly stressed and anxious about where he was. Janet felt like the staff weren't taking her seriously or doing as much as they could to help before they had to board their flight back home.

Consumers also need the experience of being in the airport to be simple and clear at all times. All consumers need to trust that they will be able to get where they want to be at the appropriate time, know what to do at each step they get to and know where to go for support if needed. Currently, this isn't always the case. Chris, 26, has dyslexia and finds it quite challenging to read the board to find his gate and to understand where to go. When he asks for support, he doesn't always feel like staff are sympathetic to his situation, particularly as he's a young man who doesn't necessarily present as someone needing support.

24   Base: n=1900, general public survey

To choose

In line with the social model of disability, most of the consumers with challenging personal circumstances want to maintain their independence as much as possible. Independence is achieved in different ways for different people, and often they themselves know best what would help them to do this. Consumers currently feel constrained by inflexible systems or a 'one size fits all' approach and feel like they have little power to choose the activities and support that is right for them. This results in passengers feeling uncomfortable, stressed, and overall, not having a positive airport experience.

Mei is 35 and wears a cochlear implant. For most of her day-to-day life, she is incredibly independent. When she travelled through Heathrow Airport, despite being able to walk, Mei requested the Assistance Service as she couldn't hear the announcements when her flight is called. She was provided with a buggy to take her to her gate, despite being able to walk. In other journeys, she increasingly uses 'App in the Air', which vibrates when she has a gate and gives her much greater independence when she's flying.

"The freedom I get with the app means I can move around the airport more by myself"

Mei, 35,
Sensory personal circumstances

Passengers need to be able to choose what is comfortable for them – whether that be in the pace that they move through the airport or things like food, spaces or information channels that enable them to get the most out of their time in the airport.

"We felt like we were being rushed through the airport and not given the time to organise ourselves. We were choosing to take things steady! But people forget that there's passengers who don't know what to do or can't move quickly".

Joseph and Sara, in their 70s,
Physical personal circumstances.

To enjoy

Some people do not expect their time at the airport to be enjoyable, and therefore start their journey expecting to feel anxious and to encounter problems. This means they are 'closed down' to opportunities to relax and enjoy themselves.

All passengers with personal circumstances need to be empowered to enjoy their experiences within airports and make the most of the shops, restaurants and other commercial offers. Those who are looking for opportunities to enjoy themselves sometimes struggle to do so, or struggle to know how to make best use of their time in the airport.

Li Na was 76 and departing to Malaysia. She was using the Assistance Service because of her age and her reduced mobility. She reported:

"I was in their waiting room and we were told that we only had half an hour to go and get some lunch. It meant a rushed lunch, no time for shopping or enjoyable activities, and then a long time back in the waiting room before we actually had to get to the gate. I felt that it was more for the benefit of the staff than our convenience".

It goes without saying that encouraging enjoyment within airports will go hand-in-hand with greater commercial value for all airports.

Section 4
Moving forward

There is some good work being done to support and improve passenger experiences – in particular those with challenging personal circumstances. However, the task ahead is still significant. With the uncertainty and challenges raised by the COVID-19 pandemic, these issues are only going to become more pressing to encourage more consumers to travel.

Despite the scale of the challenge, it's clear that there are a number of opportunities to embrace the principles of inclusive design – to improve the airport experience for passengers with personal circumstances and beyond.

Shifting mindset around accessibility and who might require support

This work has shown that the range of passengers requiring extra support at the airport is huge: this is not just a niche requirement for some specific travellers.

Currently, a large proportion of these passengers are not being catered to in the best possible way. Anyone travelling may require extra support at some point in their journey, and the airport environment should be set-up to support the wide diversity of personal circumstances seen in this research project.

The current approach to accessibility across aviation is framed around the narrative driven by IATA codes and the use of the acronym PRM. While legally these categorisations encompass all types of support needs, the focus on physical needs in language and framing is limiting, as it masks the importance of catering to wider personal circumstances, such as cognitive and psychological concerns being more prevalent.

This doesn't mean that the airport community should reduce the effort being made to improve the experience of those with physical needs, but that they should recognise that the challenge is far broader – and that the current over-focus on physical mobility restrictions is ultimately unhelpful in ensuring that all consumers have a world-class experience.

Using data to give greater understanding of personal circumstances

Whilst this research has given a glimpse into the diversity of personal circumstances, for airports and the wider aviation industry to be able to provide a better experience, a greater understanding of *individual* personal circumstances is required.

Currently, airports have limited ways to identify who has a personal circumstance and the nature of the situation – which means limited support can be offered if required. This points to an opportunity to develop better ways of identifying personal circumstances – for example by enabling people to feel confident speaking about what they need and better use of data before and across the airport journey.

Approaching solving 'pain points' as a 'minimum standard'

This research has shown that there is a perception that efficiency is currently prioritised over customer experience, especially regarding passengers with personal circumstances, who often feel that there is little focus on making their airport journey enjoyable.

There are opportunities to do better, which could also improve the commercial success of airports – as demonstrated by the number of consumers who are not able to access the facilities, food or shopping that they would like to, and also the number of potential consumers who are avoiding airports altogether, and aren't able to access the travel opportunities that the wider population can.

There is an opportunity – not only to address the 'pain points' that passengers are currently experiencing – but to have a much larger vision to make their experience *enjoyable* and 'world class'.

The industry cannot rely on consumers to tell them what needs to be done. Whilst consumers can report what is difficult for them, they are not professional designers, with the skills to fundamentally re-imagine whole environments or services. Instead, they tend to imagine 'add-ons' to the environment as it currently exists.

Embracing truly inclusive design – avoiding 'tick-box' solutions that add stress

Air travel is often stressful for any passenger – there are lots of pressures, uncertainties, and an inevitable loss of control. This is exacerbated for those who have any kind of personal circumstance. When thinking about potential solutions, it's important that airports avoid things that add even more stress for these passengers. It's not about asking them to work harder to access a solution, but about minimising the problem in the first place.

Often people know what they need and want to remain independent. Solutions should focus on empowering individuals to do as much as they can.

In line with inclusive design principles, there is also an opportunity to promote 'normality' – designing solutions which make the airport journey more pleasant for all passengers, instead of singling groups out and giving them 'different' treatment because of their circumstances. Ultimately, great inclusive design should be invisible to all – including those who it is designed for.

Thinking beyond 'products' / embracing the full range of design mechanisms

When thinking about 'solutions' it can be easy to default to products or 'add-ons'. Great solutions are not just a 'tick-box' exercise of adding on a 'thing' but should be integrated within the typical airport journey.

There are a broad range of potential mechanisms that can be used – including service, communications, product and environment. Ideally, a combination of these things should work together in harmony to enable great experiences.

Collaboration across the industry

Heathrow cannot improve accessibility in air travel alone. Heathrow Airport is just one part of the experience – part of a wider ecosystem with a large number of stakeholders. Beyond the airport, there is a need for the organisations who have a role in shaping the end-to-end consumer journey to empathise with the broad range of passengers, their personal circumstances and what would help them.

There is a real need for collaboration within and across organisations, both nationally and internationally – for example, through sharing data, effective handovers and transition points, communication, shared language and planning. Without collaboration, efforts will be futile.

Summary of opportunities

In summary, this research has shown that there are significant opportunities to improve the air travel experience for all consumers, including those with personal circumstances.

These include:

- Shifting the industry narrative around accessibility and who might require support – away from solely people with reduced mobility to a much broader definition and understanding.

- Using data to give greater understanding of individual need.

- Going beyond solely solving problems that consumers identify and to think on a more visionary scale about how to make consumer experiences 'world class'.

- Embracing the full range of potential mechanisms to design solutions – not over-relying on 'add-ons' that can often add more stress.

- Collaborating with organisations and stakeholder across the industry, both nationally and internationally to implement a shared vision for accessibility.