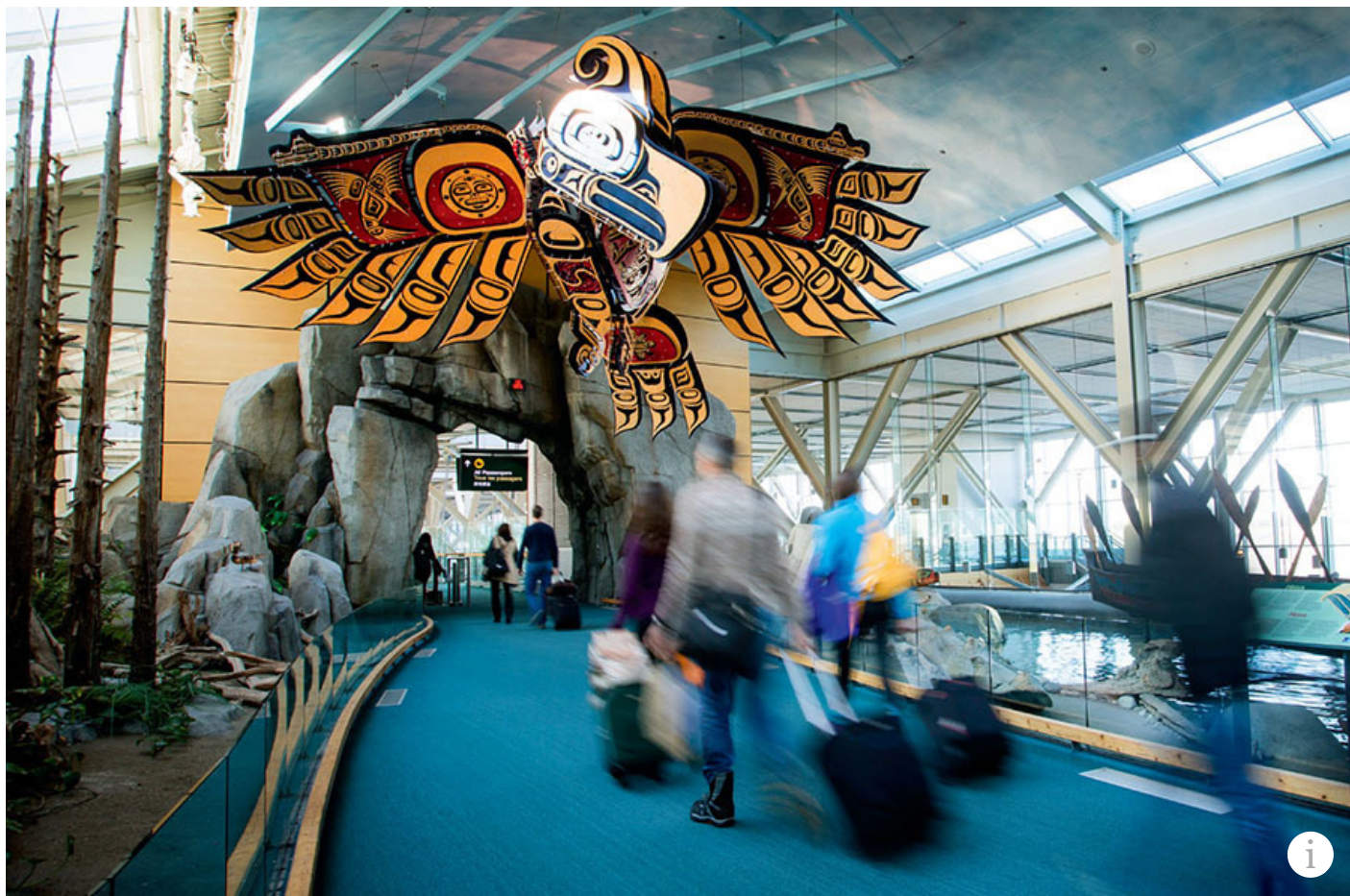


What Do Travelers Expect Of Airport Terminals?

BY JOSEPH CHANG, RA



New terminal designs not only are adding needed capacity to meet growing traveler volumes, but recent passenger surveys conclude that they are improving traveler satisfaction (J.D. Power 2018 Passenger Satisfaction Survey).

Air travel remains a stressful experience for many travelers, but increased efforts to improve the basic drivers of passenger satisfaction — clean modern facilities, efficient security processes, courteous staff, and better dining and shopping options — are making airports a less stressful part of the journey. Beyond meeting these practicalities, airports are undertaking new designs to create terminals where travelers enjoy spending their time.

How terminal designs enrich and provide travelers a genuinely rewarding experience often depend on the trip's purpose and individual traveler personas formed by culture, personality, gender, physical and cognitive condition.

Business travelers want terminal designs and services that deliver convenience, control of their travel options, and facilities that enhance "on-the-go" productivity and promote personal well-being. As a group, they are more apt to embrace technology to speed their way through airport processes. A survey of business travelers (*Egencia Business Travel and Technology Survey, July 2017*) found that 50 percent of global respondents would avoid human interaction on the road unless they are having a problem.

Integration of technology to provide a seamless experience entails close collaboration among airlines, government agencies and airport operators to create a personalized, frictionless and seamless journey through the airport. Delta's successful roll-out of facial recognition technology from curb to gate at Maynard H. Jackson International Terminal and Concourse F at Hartsfield-Jackson Atlanta International represents such a collaboration among the airline, U.S. Customs and Border Protection, TSA and the airport. Travelers appear willing to override inhibitions over sharing biometric data for faster and more convenient processing since Delta reports less than 2 percent of the 25,000 customers who travel through Concourse F each week opt out of the facial recognition process.

At the other end of the traveler persona spectrum are occasional air travelers who are likely traveling during holiday seasons when airports are most chaotic. Occasional air travelers may be unfamiliar with check-in weight limitations or security protocols and rely more on human interactions and wayfinding systems.

Thoughtful amenities such as tables for repacking luggage in check-in areas and waste and liquid disposal units in security checkpoints help minimize frustration. For occasional air travelers, the confusion and stress from navigating through airports are

reduced by intuitive wayfinding design that involves designing spaces to communicate steps along the departure or arrival process, hierarchical organization of visual elements, and placement of furniture to direct traffic flows.

Embedded within the different traveler personas are travelers living with physical or cognitive conditions. According to a 2011 report by the World Health Organization (WHO), over 1 billion people, or about 15 percent of the world's population, live with a physical or mental impairment that substantially limits a major life activity. The number of people living with a disability is increasing in large part due to population aging.

Today, most people can expect to live into their 60s and beyond. The 2017 United Nations report *World Population Ageing* reported the global population aged 60 years or over is more than twice as large as in 1980 and is expected to double again by 2050, when it is projected to reach nearly 2.1 billion. Even though life expectancy has increased, the WHO finds little evidence to suggest that older people today experience better health than their parents. While rates of severe disabilities have declined in high-income countries over the past 30 years, there has been no significant change in mild to moderate disabilities over the same period.

The ADA National Network (<https://adata.org/factsheet/aging-and-ada>) reports that 30 percent of Americans over age 65 and 50 percent of those over age 75 live with a disability. A 2019 panel discussion on passengers with disabilities at the 2019 International Air Transport Association Annual General Meeting asked participants, "How many of us will be traveling with a disability in the future?" It concluded that disabilities are not about "them" but "us" and not about "if" but "when."

Airport terminals have become larger, with the result that navigating through terminals can be challenging for non-impaired travelers and near to impossible for impaired travelers without assistance from wheelchairs or other mobility aids. Travelers with hidden or invisible disabilities can be challenged and confused by unfamiliar or unusual terminal environments. The spectrum of challenges faced by travelers with hidden disabilities can range from reading flight information displays, hearing overhead announcements, security pat-downs, anxiety caused by long flight delays, and sensory over-stimulation.

Overcoming difficulties caused by design or interactions with other people — and not just by a traveler's impairment or age — can only be met through cooperation among

airlines, airport customer service providers, designers and organizations that serve and advocate on behalf of travelers with disabilities. Designing for inclusion is reflected in universal design principles that advocate for equitable, flexible and intuitive design, providing redundant communication of essential information using pictorial, verbal and tactile messaging, and minimizing hazards and adverse consequences of accidental or unintended actions. Technology is providing independence for travelers with disabilities and more freedom by improving the ability to pre-plan itineraries to better meet specific needs, software to improve delivery of mobility assistance, and visual paging systems to provide hearing impaired equal access to information broadcast over public address systems, including courtesy pages and emergency information.

Digital connectivity is as important as an airport terminal's physical premises in contributing to traveler expectations regardless of traveler persona. Surveys conducted in 2018 by the Pew Research Center

(<https://www.pewresearch.org/global/2019/02/05/digital-connectivity-growing-rapidly-in-emerging-economies/>) showed that more than nine in 10 people globally use the internet in advanced economies. In emerging economies, about half or more use the internet in every country except India. Increasingly, smartphones are the most common means for connecting to the internet. While smartphone ownership has been rising fastest among young adults, the age gap has been closing in recent years as smartphone adoption among older groups has grown, particularly in advanced economies. Digital connectivity allows business travelers to move efficiently through airport processes without needing to interact with airline staff until after boarding. It allows leisure travelers to update their social media feeds, and gives occasional travelers access to real-time navigational assistance.

In related industries such as transportation, retail and hospitality, technology is enabling unprecedented personalization and convenience for consumers and points toward changing expectations for an enjoyable airport terminal experience. The Transportation as a Service model, such as ride-sharing services, shows travelers wanting flexible transportation options that can be summoned through a smartphone. E-Commerce is changing retail as the U.S. Department of Commerce (*New Insights on Retail E-Commerce, July 2019*) index of retail sales showed that online retail sales grew at an annual rate of 28 percent from 1998 to 2015, which was nine times the growth of all other retail sales. To counteract this trend, brick and mortar stores are being re-

designed to provide an immersive retail experience that forges an emotional connection with customers.

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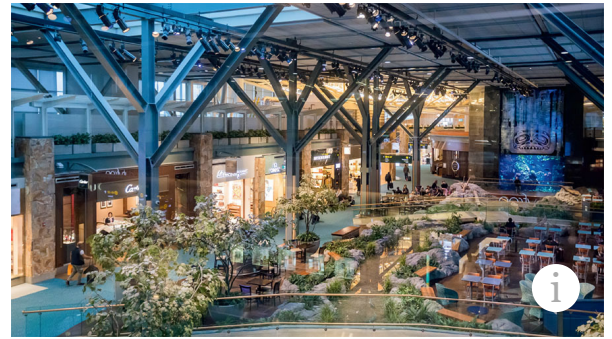
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Apple's stores invite customers to explore and touch the company's products, an outdoor equipment retailer builds event spaces for customers to tryout products and to socialize with people who share similar interests, and a beauty product company's stores invite customers to indulge in hand massages in a setting evoking cobblestoned village streets and lavender fields.

Digital services and the sharing economy, as embodied by Airbnb, have disrupted the hotel industry by providing a convenient online marketplace offering unique venues at affordable rates. Travelers

using Airbnb are as likely to be experiential travelers who want the intimacy and authenticity of staying in a unique neighborhood or near an attraction as a value traveler. A survey of travelers found that more than 71 percent of Airbnb users earned over \$75,000 (*Morgan Stanley Global Insight, Internet, Lodging, Leisure and Hotels, November 10, 2017*) compared to 33 percent for non-Airbnb users. In response, traditional hotel brands are expanding subsidiary portfolios to provide the intimacy of a neighborhood experience, redesigning lobbies and rooms to reflect contemporary lifestyles, and more guest-directed services.

The number and diversity of travelers grow each year along with changing expectations brought on by new technology adoption that is changing lifestyle and consumption habits. Travelers still want smoother and easier processing, but they do not want to use the airport terminal in the same way or find value from the same things. Perhaps one of the harder challenges to designing new airport terminals or modernizing an existing terminal is to harness the energy created by thousands of people anticipating the excitement to fly, while at the same time providing the opportunity to enjoy one's own company.

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