Landrum & Brown looks at the three key passenger types expected post-Covid-19 and what airports can do to meet their specific needs

HAPPY JOURNEYS

For many years airports and airlines have understood that they have an important role in defining the passenger experience. Airlines have been leaders in providing different types of passenger experiences and products to match all price points – from pay-as-you-go offerings providing basic economy fares with fee-based extras, to those offering 'bedrooms in the sky'. Air travel has become increasingly flexible and based on individual passenger wants and needs.

Airports are constantly learning how Covid-19 has affected passenger behavior. Many previous behavioral patterns have changed, and a smaller collection of patterns have been reinforced. The aviation industry will inevitably return to 2019 activity levels; however, changes to the industry as a result of Covid-19 will remain.

Global passengers will demand far simpler, more convenient and defined experiences both in the terminal and in the air. To remain competitive in a post-Covid-19 world, airports have to understand the types of customers they serve, and what they want out of their terminal experience.

Defining passenger behavior

Prior to Covid-19, there were basic passenger types based on behavioral patterns. These passenger types still exist, but some patterns have intensified, and some have lessened or become blurred. One major behavior pattern change is the acceleration of the wellness trend for passengers. Wellness-focused passengers are no longer a category of passenger because of Covid-19; all passengers are more focused on wellness. Moving forward, airports must include wellness-focused offerings in the terminal to maintain a happy journey for passengers.

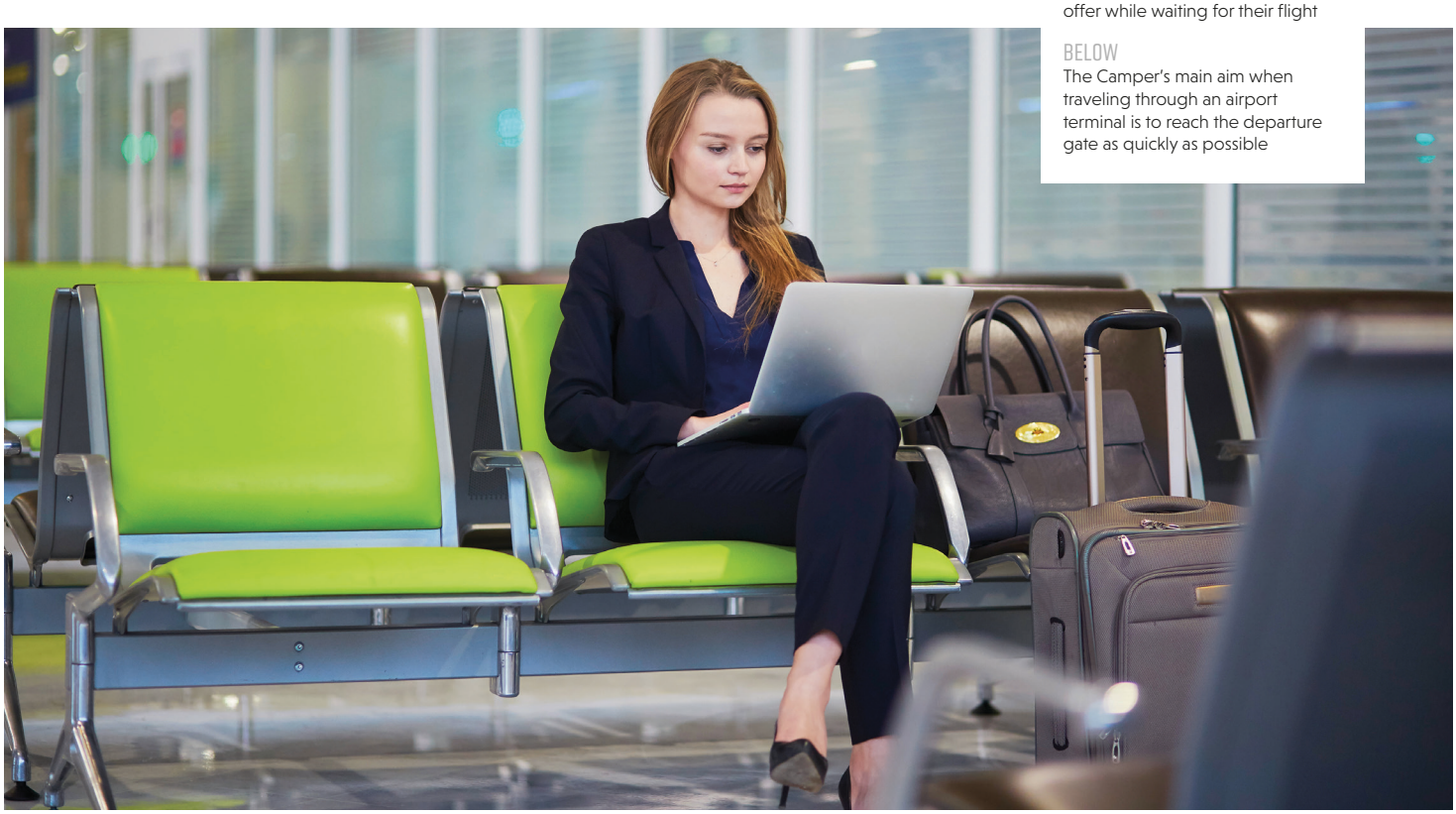
Three common passenger types, and keys to providing a happy passenger experience for each type, are identified below. Airports should look to these passenger types as they move forward in planning for passenger experiences post-Covid-19. Understanding passengers and their needs has direct implications on customer satisfaction and leads to profitable facilities for airports and airlines.

Passenger type 1: The Camper

This typically no-nonsense passenger's goal is to get checked in, breeze through security, and head directly to a membership airline lounge or departure gate lounge. Studies have shown this passenger behavior is less due to anxiety over missing a flight but more about the passenger's desire to avoid crowded areas and find privacy.

The Camper comes from both sides of the economic spectrum: business travelers with airline lounge memberships and budget travelers who sit at their assigned gate lounge. The Camper's pattern of travel is generally from the curb to a direct point in the airport, with limited encounters with the airport terminal environment. This presents challenges to airport operators because these passengers are not interacting with any concessions or partaking in many terminal experiences.

As activity returns, airports will see an increased demand for self-serve, zero touch and rapid concession opportunities. These 'fast' concessions will reduce contact for passengers focused on health and wellness and will cater more to The Camper.



RIGHT
As their name suggests, the Explorers will explore the passenger terminal and all it has to offer while waiting for their flight

BELOW
The Camper's main aim when traveling through an airport terminal is to reach the departure gate as quickly as possible



LEFT
The Roamer is the typical passenger type who, on their way to the gate, will usually stop for food and look around the shops



> **Curating the physical space along the path of travel to the gate** with multiple shop and food/beverage offerings will be essential

However, it could come at a loss to more 'slow' concessions, which provide a much richer and hyper-personalized experience.

Ibrahim Ibrahim, managing director at Portland Design, a global leader in defining customer experience for airports, accurately points out that because of the changes from Covid-19, "precedent is no longer a guide". Therefore, to ensure the camper has the happiest journey, both retail and food/beverage offerings must be self-evident, along paths of travel, and within sight of every gate lounge.

Passenger type 2: The Roamer

The Roamer is the most typical passenger type. On an eventual mission to their gate, The Roamer is more likely to take time to grab something to eat, shop, or both. Unlike pre-Covid-19 when The Roamer would meander between shops and restaurants and come into contact with numerous other passengers and airport employees, now they will put health and wellness first. The Roamer tends to not want to wait in queues, and as a result, will be less interested in socially distanced dining.

For Roamers, the safety of their journey through the terminal is key to their overall passenger experience. Curating the physical space along the path of travel to the gate with multiple shop and food/beverage offerings will be essential. These concessions along free-flow paths coupled with easy-to-use self-service point of sales will still enable The Roamer to get to their gate and enjoy the terminal experience, while increasing their feeling of health and wellness.

Additionally, single access in-and-out shop or dining will likely not survive in a post-Covid-19 airport. Ibrahim continues, "Stripping out complexity will be the result of the demand for simpler, more convenient experiences," something that will improve The Roamer's passenger experience.

With the proliferation of 5G biometrics and image recognition technology, the growth of 'ambient retail' is evolving in airports. Whether one is able to purchase items off a photograph on a mobile device or through 'stop and go' touchless areas, these designs create a paradigm between the traditional physical experience and the new digital one, which will surely evolve into new and exciting experiences for all passengers, but particularly appeal to The Roamer's desire to experience terminal retail and F&B concessions while avoiding long queues and extensive social interaction.

Passenger type 3: The Explorer

These passengers are natural navigators and adventurers. They love to travel. Curious and fearless, Explorers tend to be solo and share a love for great airport terminals, carving out enough time to explore multiple areas and taking advantage of all the diverse offerings. The Explorers are the passengers most likely to seek out art installations or the latest offering at the airport. The Explorers were also most likely to engage in pay-as-you-go luxury experiences, which were beginning to become more mainstream pre-Covid-19.

The first travelers during Covid-19 were the explorers, who showed they are easily adaptable to changing protocols and environments. It is important for airport operators to focus on enriching their environments, with wellness in mind, to meet this type of passengers' needs.

One idea is to connect passengers to nature while in the terminal, through the use of different types of flora and native plant species. Incorporating plants and nature into terminals is an effective strategy for reducing anxiety and providing positive passenger experiences. Explorers crave these types of experience and push the passenger experience trend away from the structured, ticket lobby to gate experience to a much more fluid and diverse passenger journey, with exciting opportunities before departure and on arrival.

Ultimately, airports will need to balance the needs of all passenger types as travel returns. Ibrahim predicts, "There will be more demand for private spaces and by-appointment offerings where people who know each other can gather."

The ramifications of these new types of requests could lead to fee-based appointments for security screening or expanded pickup points for 'grab and go' of pre-purchased food and retail. Whichever options airports choose to implement, it will be important for airport leaders to keep in mind the different passenger types and their differing experience needs and expectations, and ensure all changes focus on health and wellness, so all passengers can have a happy journey through the terminal. ■

Authors

This article was written by Joe Barden, vice president of terminal planning at Landrum & Brown, in coordination with Ibrahim Ibrahim, managing director at Portland Design