Areas of Perception at Airports

Airport Marketing An Analysis of Areas of Perception at Airports with focus on behavioral assumptions

Airports offer huge potential to advertisers due to their physical segmentation of target groups and overall higher levels of perception by consumers. The unique advertising presence that airport marketing can offer is due to several advantages. Firstly, travelers at an airport have an overall higher attention span than in everyday activities or situations, which allows for advertising to have a higher impact.

Also, much time at an airport is spent waiting or queueing, at which times passengers are exceptionally perceptive to their surroundings. And, in general, people react positively to out-of-home advertisements. Airports have largely outgrown their sole purpose of just being travel hubs. By connecting millions of passengers to their destinations each year, and by doing so on an international scale, they have become increasingly attractive for mar-

keting opportunities. Airports are using the growing number of passengers and its related exposure to boost out of home advertising, that targets consumers while they are outside of their homes. Due to the number of potential international customers, airports are ideal for pushing brand awareness. Numbers back this statement with global duty free and travel retail sales rising to $76 Billion in 2018, whereas traditional malls tend to struggle.

Passengers

Ad effectiveness will largely depend on the type of passenger and how well they are targeted. It is essential to understand one's passengers and to recognize their core values. The traditional approach of passenger segmentation is to classify them depending on the duration and purpose of the flight. However, other factors such as the fact that there are differences in passenger expectations also need to be taken into consideration. In the airline industry, two fundamental criteria are being used when it comes to market segmentation: the purpose of the trip, is the passenger a business or leisure traveler, and the frequency of travel, is the passenger a frequent or non-frequent traveler. Business travelers, for instance, have higher levels of disposable income and have identifiable spending patterns. Due to their frequency of traveling,

though, they are less likely to browse and may regard shopping as unnecessary, making them spend less on a single journey. Leisure travelers, on the other hand regard the airport as more of an experience being part of their

> ## It is essential to understand one's passengers and to recognize their core values.

trip. They enjoy it, are in a good mood and willing to spend money. However, the actual behavior of traveling passengers remains an under-researched area.

Passenger Journey

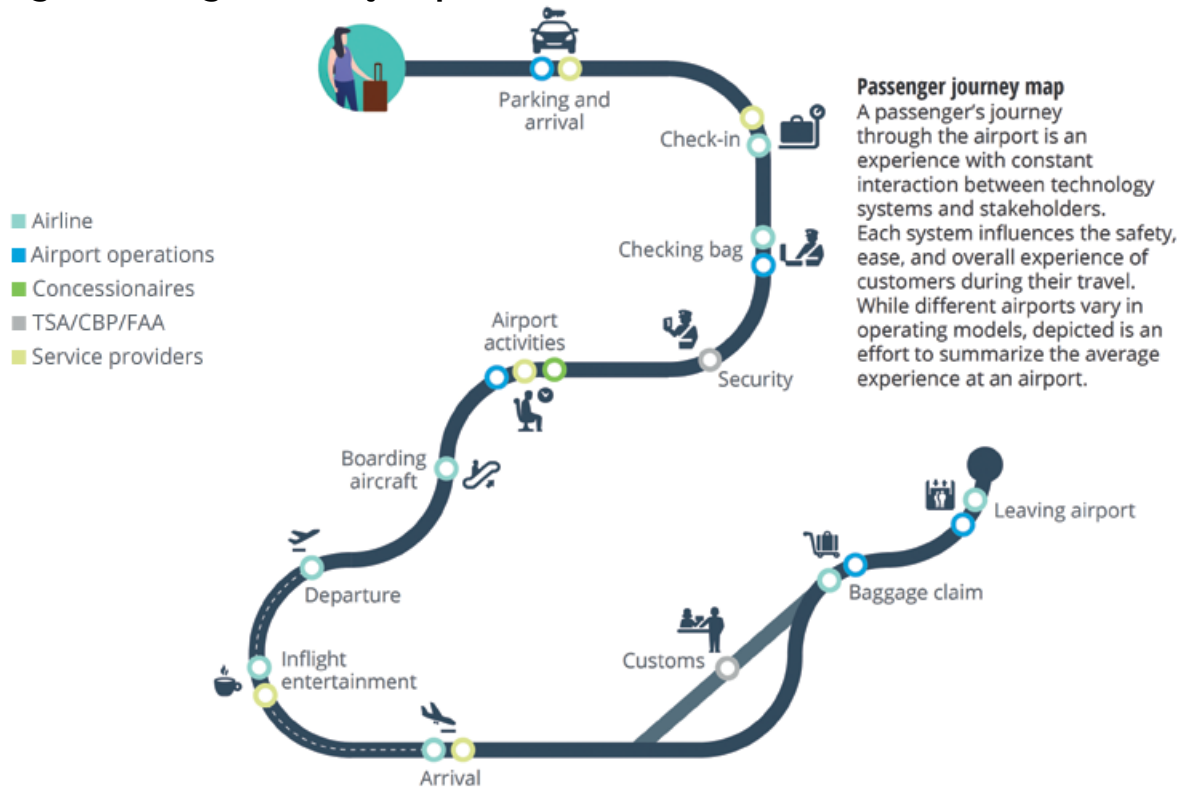The travel experience of each passenger is dependent on the touchpoints of their respective

passenger journey. A framework created by Deloitte (showed below) supported our breakdown of the passenger journey into its respective touchpoints. While the overall passenger journey is similar for each individual, their movement along the journey, time expense at individual touchpoints and overall behavioral patterns may differ, especially when comparing business and leisure travelers. When it comes to advertising opportunities, airports can provide options to market across all touchpoints along the passenger journey, starting at parking and the arrival at the airport, and ending with the passenger leaving the airport.

Areas of Perception and Impact

Along the different touchpoints across the passenger journey, external factors influence behavioral patterns. We looked at the

Fig. 1: Passenger Journey Map

Passenger journey map
A passenger's journey through the airport is an experience with constant interaction between technology systems and stakeholders. Each system influences the safety, ease, and overall experience of customers during their travel. While different airports vary in operating models, depicted is an effort to summarize the average experience at an airport.

Legend:
- Airline
- Airport operations
- Concessionaires
- TSA/CBP/FAA
- Service providers

Map touchpoints: Parking and arrival, Check-in, Checking bag, Security, Airport activities, Boarding aircraft, Departure, Inflight entertainment, Arrival, Customs, Baggage claim, Leaving airport.

Source: Flying smarter – The smart airport and the Internet of Things (Deloitte).

parameters stress level, level of distraction, amount of time spent and freedom of movement, which all influence the level of perception of passengers at a touchpoint, and thus the effectiveness of advertising measures.

Departure Hall

The public departures hall is the first physical touchpoint of the passenger journey. Upon arrival at the airport, most passengers might experience high levels of distraction as they are searching for check-in counters and baggage drop-off. The stress level will be moderate to high, depending on the passenger's remaining time until boarding. In general, the amount of time spent here will be rather low, as passengers prefer to pass through the first touchpoints quickly to avoid a stressful situation later on. Overall, passenger's perception at this stage is low to moderate, thus, so is the impact of advertising material.

Check-in

Once passengers have located their check-in counter and/or baggage drop-off, they will have to wait in line, which gives them the chance to observe their surroundings. This leads to a low level of distraction as there is nothing else to focus on but making progress in the queue. However, passengers will most likely want to pass through check-in quickly, leading to a medium stress level. They cannot move around freely, as they will have to wait in line, so adequate advertising has to be observable from the queue. The traveler's perception at this stage will be moderate to high, mostly depending on waiting times. It has to be noted that advertising at this touchpoint is becoming less attractive,

as increasing numbers of passengers decide to check-in online, if possible, especially when traveling with carry-on luggage only.

Security Control

This touchpoint may provide one of the lowest impacts of advertising. At this stage, passengers will be very focused on the process of putting any carry-on luggage inboxes and passing through body scanners. This leads to a high level of distraction. Travelers may also be worried about the hold-up in this phase due to issues with their hand luggage or other problems, causing high-stress levels throughout this stage. Passengers' perception of surroundings, therefore, is quite low, leading to the mentioned low impact of advertising at this stage.

Duty-Free

At most airports, after passengers went through the security control, they will reach the duty-free area. Here the passenger's stress level is not that high anymore because they already went through the security check. If passengers have enough time until boarding, they will be relaxed and walk through the duty-free area, spending a couple of minutes there.

> **The public departures hall is the first physical touchpoint of the passenger journey.**

Nevertheless they will only spend a few minutes there since they are still a bit stressed from the security check and might want to sit down first. However, if under time pressure, they will rush through. Perception is medium or low if stress level and time pressure are high. Leisure travelers will enjoy the duty-free as part of their travel experience and take some time to browse. Business travelers, on the other hand, do not spend much time in the duty-free area. They will only walk through to get to the gate or lounge and will not bother looking around. They have a deficient perception here. In general, distraction is high, with many other passengers, shops and other objects blocking the view.

Gates

For both business and leisure travelers, stress levels now are low after arriving at their designated gates. This gives them the chance to relax while waiting for boarding and allows them to perceive their surroundings while doing so. In most cases, passengers will spend about 30 minutes at their departure gate, giving them plenty of time to see advertisements around them. As there are no other worries, the level of distraction is low. With these factors,

INTERIOR WITH DUTY-FREE SHOP at Airport Dusseldorf.

BAGGAGE CLAIM
Part of the post-flight airport areas.

passengers' level of perception is high, guaranteeing a high impact of advertising material on both business and leisure travelers.

Entering / Exiting the airplane

At most airports, passengers either enter or exit the aircraft via a passenger bridge or a bus that takes them directly to the plane. Both offer the possibility of displaying advertisements. However, the perception varies.

Passenger Bridges

When entering the aircraft it can be assumed that leisure travelers are still relaxed but might be excited: their journey is about to start. Hence, their stress level might increase again, leading to a low perception of their surroundings. Therefore, the perception level is not as high as it was when waiting at the gate. Business travelers, on the contrary, will remain relaxed since this is a standard procedure for them. Regarding their perception level, two different assumptions can be made. Either because of the factors mentioned above, they have a high level of perception and will look at the displayed adds, or they will not look at them at all. Since they are so used to the situation, they might not pay attention to their surroundings anymore. After the arrival at the destination, most passengers want to get to the baggage claim as fast as possible since they are exhausted after a long flight. They do not pay attention to the ads displayed on the passenger bridge. Assuming passengers are not tired from the flight, leisure travelers will most probably be excited about the destination where they arrived and are therefore distracted, while business travelers are focused on the task ahead. Either way, perception is low for both groups.

Bus Connecting to Airplane

When getting to the aircraft via a bus, perception is even lower compared to passenger bridges. The busses are mostly crowded,

> **Even if passengers are distracted and looking for their luggage, different types of media and ads would appear in their perceptual fields.**

leading to a high level of distraction. This is true for both leisure and business travelers. Besides this the drive to the plane might be of more considerable excitement. After arriving at the air-

Table 1: Behavioral Assumptions Throughout the Passenger Journey

Airport area	Distraction level	Stress level	Period of stay	Freedom to move	Perception & impact
Departure hall	4	4	2	2	2
Check-In	3	3	3	1	3–4
Security control	5	5	2–3	1	1–2
Duty-Free	2	2	2	4	3–4
Gates	1	1–2	5	2–3	5
Passenger bridges	1	1	1	1	3
Airport buses	1	2	1	1	3
Baggage claim	1–2	2	3–4	2	4
Arrival hall	2–3	3	1–2	2	2–3
Access to public transport & rental	3–4	3–4	2	1	2–3

Intuitive Index: 1 – very low, to 5 – very high. Source: Own research.

port, the same factors, as mentioned above, will be dominant, leading to low perception for business and leisure travelers.

Baggage Claim

Baggage Claim is part of the post-flight airport areas. Stress levels might increase again as passengers are looking for their bags. The levels of distraction are high due to the number of people in the area and the passengers focus on getting their bags. However, if passenger have a lot of time to kill, they will be looking for distractions. This provides new opportunities for advertising through strategically placed ads and media towards and on the baggage claims itself. Even if passengers are distracted and looking for their luggage, different types of media and ads would appear in their perceptual fields. A perfect example can be found at Stuttgart airport. The latest technology has been implemented here. Not only

effective communication on modern screens is shown but also information on local transportation is being displayed. A best practice example for airport communication has been installed.

Arrival Hall (Public)

The arrival hall provides other unique advertising and media opportunities for post-flight airport experiences. It is one of the last stages of the journey, and at the same time, one of the first impressions passengers make of the country of destination. This offers vast new opportunities for airports, specifically when it comes to vacation goers. Generally spoken, stress levels vary again, passengers are happy to have made the voyage, or to be reunited with their family depending on business or leisure travelers. In general terms, leisure travelers are excited to get home or about the adventure ahead, in case they are on vacation. Ex-

haustion and tiredness are factors to consider at this stage, which would make passengers somewhat distracted. Business travelers, on the other hand, are focused, either get picked up or are thinking of their next means of transportation from the airport. Depending on the type of passengers and their reason for travel, perception levels are either high, as for vacation goers or low, as it is the case for travelers that are focused on arriving at their final destination.

Access to Public Transit and Rental Cars

This is the very last airport area, access to transportation from the airport. Passengers already have a journey behind them and might be exhausted. Finding the way to rentals or buses might be challenging if this is not well displayed. Passengers are therefore focused on the task ahead and perception levels are low. Dwel-

LEAVING THE TERMINAL at Airport Munich.

ling time is low, therefore passengers will not absorb much information. For vacation-goers however, airports can further extend the arriving experience and highlight the country's characteristics through further media. It is

hubs and by connecting millions of passengers to their destinations each year on an international scale, they have become increasingly interesting for business and related marketing opportunities. In fact, passengers are easily

communication will be key to secure the impact and improve the effectiveness of communication measures. With these insights, advertisers can deliberately choose the areas that are most effective for displaying their ads.

> A careful selection of airport locations for communication will be key to secure the impact and improve the effectiveness of communication measures.

not uncommon for large promotion zones to be within this area, advertising cars before arriving at the rental station, for instance. The table below summarizes our assumptions using an intuitive index reaching from 1 – very low, to 5 – very high.

Summary and Outlook

Airports largely outgrew their sole purpose of simply being travel

segmented and can be reached effectively throughout specific airport areas, making some areas more suitable for advertising than others. Emotional states, roaming time and the freedom to move vastly, influence how much information passengers are able to absorb from their direct surroundings. Finally our research shows that some areas are more suitable than others. Therefore a careful selection of airport locations for

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