CHAPTER 4

Aerotropolis: London's Airports as Experiences and Destinations

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Introduction

This chapter considers the role of London's airports as experiences and destinations. While arriving by air can offer visitors an ultimate vertical city tourism opportunity (see Chapter 6), airports themselves provide the first and last experience that many tourists will encounter when they travel to a city, and so are very significant destination spaces. However, it is not always clear how visitors perceive their airport journey in relation to their overall trip. It may be that they view this journey as just a necessary and functional activity that precludes the start of their actual visit. Alternatively, the journey may be considered as an integral and non-separated part of the visit, with a positive airport experience enhancing the visitor's overall perception of the destination, and with a negative experience having the opposite effect. Arguably, the airport journey could even have some impact on the visitor's willingness to return.

The airport journey offers a range of services and facilities that are available within the terminal, with modern-day airports providing much more than

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just the basic infrastructure to allow travellers to transfer from surface to air modes of transport. Some of these services, for example those related to retail and entertainment, have the potential to enhance the passenger experience and increase the airport's attractiveness, while at the same time supporting the financial well-being of the airport. Airports can also be viewed as destinations in their own right. This may be related to the deliberate development of a so-called Airport City or Aerotropolis, when airports expand beyond the boundaries of the traditional aeronautical business, by using neighbouring land for a number of additional activities, including event, conference or leisure facilities that may attract visitors. Alternatively, such development may occur in a more unintentional, organic and piecemeal fashion, encouraged by connectivity to international markets coupled with good local access that airports can provide.

For London, tourism was originally driven by the railways and grand stations that were built in the nineteenth century to impress arriving visitors, but it is now primarily airports that provide London's gateways. The situation is complex, as London offers not just one airport or gateway but a range of different ones, each having unique features and characteristics, and appealing to different airlines and passengers. The research literature has rarely considered these issues in relation to London as a destination, and so the aim of this chapter is to begin to fill this gap. It starts by exploring the general concepts that are relevant when considering an airport as an experience or destination space. This is followed by an overview of the airport system serving the London area. Bringing these two discussions together enables an assessment of the role and nature of London's airports as experiences and destinations.

General Concepts

Airports, in common with motorways, hotel rooms and shopping rooms have been defined as 'non-places' by the French anthropologist Marc Augé, being considered as spaces of transience, where people remain anonymous, and that are not significant enough to be regarded as a 'place' (Augé 1995). However, this detached placelessness notion for modern-day airports has been increasingly challenged (Appold and Kasanda 2011; Losekoot 2015), particularly with respect to whether waiting at airports can be pleasurable (Lloyd 2003) and whether airports can be viewed as so-called 'third spaces'. These spaces are separate from the two usual social environments, namely the first place or home and the second place or work, and are neutral ground where people can gather and foster community interaction, for example in cafes or bars, or in public places such as parks and libraries (Oldenburg 1989). Honegger (2013) stated that 'The airport has become, both literally and figuratively, a "third place" – a neutral crossroads of culture and function …' rather than '… non-places or a necessary pause between where one is and where one is headed' with Gottdiener (2001) arguing that airports have now become specific places in their own right with roles as a transition space and gateway; shopping mall; and city and community.

Views related to the airport space need to take into account the impact on the passenger experience, but this has received scant coverage in the literature, in spite of connected concepts, such as the visitor or tourist experience, being topics of popular debate. A notable exception is the research of Huang et al. (2018) who explored the liminal nature of airports and presented a phenomenology of passenger experience in accordance to their familiarity with the space. Within the literature on airports, the terms service quality, passenger satisfaction and passenger experience are used interchangeably, with just vague, if any, distinctions being made. Whilst these are linked concepts, their focus varies and they involve different viewpoints.

Service quality assessment relates to whether certain service standards, defined by airport management, have been achieved. Passenger satisfaction is clearly influenced by the service delivered, but it is also affected by passenger expectations. This is the basic thinking behind popular generic models such as SERVQUAL that have been used in the airport context (e.g. Pabedinskaitėa and Akstinaitėa 2014; Mwanza and Chingarande 2013) as well as airport specific models (e.g. Fodness and Murray 2007; Pantouvakis and Renzi 2016). The passenger experience is a newer concept to emerge. It concentrates on areas perceived as significant to passengers, rather than on how services are being delivered, which is the key role of conventional service quality assessment. It involves taking a subjective holistic perspective of the various encounters that passengers face in their airport journey, whereas service quality is more about measuring variables using specific criteria. Therefore, the passenger experience needs to cover the overall door-to-door experience, including transport to/from the airport. Also, a wider viewpoint of service provision is required by considering other organisations, such as airlines and government agencies, as well as the airport operator, that contribute to the entire journey. Ultimately the overall experience is determined by the weakest link, and passengers are rarely familiar or concerned with the distribution of responsibility amongst different service providers. A relatively new way to investigate a more holistic view is through an analysis of online passenger reviews, typically as reported by Skytrax (Bogicevic et al. 2013; Wattanacharoensil et al. 2017) or Google (Lee and Yu 2018).

Within the limited literature in this area, the airport experience has been described as all the activities and interactions that passengers encounter at an airport, with these activities being divided between the necessary processes and discretionary activities (Popovic et al. 2009). It is defined as the net impression of all of the experiences a passenger has in an airport as judged by a passenger's individual standards, expectations and perceptions (Boudreau et al. 2016). Airport experiences have been examined from the three key perspectives of airport management, passenger and the public (Harrison et al. 2012) and by investigating the relationship between time sensitivity and the degree of passenger engagement (Harrison et al. 2015). They also have been considered at three different levels in a so-called pyramid of passenger perception levels (ACI-Europe 2014). At the bottom of the pyramid is the required level covering all basis and mandatory elements. The second level is related to what passengers expect of an airport whereas at the top 'valued' level there are features that surprise passengers and create a 'wow factor'. Progressing up through the different levels of experience is somewhat similar to Maslow's well-known hierarchy of human needs model (Boudreau et al. 2016). Employing state-of the-art technology with the essential processes at an airport is commonly viewed as a key way to enhance the passenger experience (Barich et al. 2015).

Within the broader context of airports contributing to the overall visitor or tourist experience, two roles have been identified, namely as an experience facilitator and an experience provider (Wattanacharoensil et al. 2016). To be a facilitator the airport needs to encourage passengers to co-create their travel experience via social media platforms and have effective internet connections. To be a provider, the airport needs to create a sense of place by providing physical settings and cultural artefacts and activities that reflect the destination. By replicating a destination's traits, the tourism experience can be extended right up to the departure gates (Brilha 2008). Incorporating local natural or man-made attractions into the airport name may help to reinforce the tourism message (Halpern and Regmi 2011). Research has shown that passengers mentally link their airport experience with a destination in three ways: by perceiving their airport experience as a representation of the place they were visiting; by viewing the airport within the context of their perception of the characteristics of the destination; and by comparing their airport experience with tourism promotional messages (Wattanacharoensil et al. 2017).

A 'stress-free airport experience' can also be a significant influence on how welcome visitors feel at a destination. Indeed VisitBritain (2018) found that 37 per cent of visitors felt that this was a very important element, with an additional 44 per cent viewing it as quite important. The resulting total importance score of 81 per cent was not far off the top score of 89 per cent for 'accommodating of tourists'. Overall, the airport experience can be considered as a vital part of the so-called visitor journey framework (Lane, 2007). This framework, which has been adopted by many tourist organisations worldwide, follows the visitor through six key interrelated stages starting at the planning stages and finishing at the return journey and beyond, with the airport experience falling within the 'travel to the destination' stage.

The airport experience is influenced by the range of commercial services and facilities on offer, such as shops and food and beverages. For airport operators, these commercial or 'non-aeronautical' revenues on average make up just under half of their total revenues (Airports Council International (ACI) 2017). When airports ceased to be considered as public utilities but rather as self-sustaining business enterprises, it was clearly recognised that their captive passenger market offered a huge potential for developing such revenues. The other 'aeronautical' revenues are generated by fees charged to airlines. Pressure from government economic regulators and cost-conscious airlines has made it increasingly difficult for airports to grow such revenues and so many airports have focused much of their attention on the non-aeronautical areas (Graham 2009) – sometimes giving rise to accusations that airports are just shopping centres or malls with runways. In this way, airport retail spaces can thus provide visitors with the benefits associated with general shopping centres (e.g. secure, weatherproof and traffic free) but also some perceived drawbacks, such as 'safe, predictable chains' (Wallop 2016).

Responding to changing consumer trends and opportunities provided by technology developments can grow non-aeronautical revenues and arguably enhance the airport experience – at least for technology–savvy passengers (Sevcik 2014; Griffiths 2014). Ensuring that passengers have sufficient time to shop at an airport can bring benefits to the destination by enhancing the visitor experience and at the same time providing this lucrative revenue source for airports (Martín-Cejas 2006). An important distinction that needs to be recognised is whether the mix of departing passengers at individual airports is dominated by outward visitors at the start of their travel experience or whether more passengers are just returning home, as this undoubtedly has an influence on what commercial facilities are most suitable to encourage spend and enhance the experience. Of course, not all passengers wish to shop at airports. Indeed, evidence shows that leisure passengers have a stronger preference to do so than business passengers and poorly planned facilities, interfering with the normal flows of airports, can leave passengers stressed and confused. It has been found that greater passenger satisfaction increases commercial spend (ACI 2016; DKMA 2014) but the relationship between the passenger experience and non-aeronautical facilities is complex and may well go in both directions.

Creating a strong local identity and sense of place experience can extend to the non-aeronautical offer and at the same time encourage passenger spend. Indeed, providing local outlets for passengers suffering from global brand fatigue is a growth area (Assies 2017). The character and culture of the city or country the airport serves can be represented by selling local merchandise or gourmet products or by theming the commercial outlets with images from the city. Moreover, the airport terminal can further act as a destination in its own right by providing conference and meeting facilities and event spaces. These facilities can be shared by passengers, local businesses and other customers (Halpern et al. 2011). Some airports may hold events related to aviation, such as air shows, or unrelated events, such as car races or shows (Prather 2013). However, in spite of these opportunities for an airport to be a destination, it does need to be recognised that for most the bulk of non-aeronautical revenues are still generated in the airside (post-security) part of the airport, which only passengers but not visitors can experience. More rigid security regulations in recent years have encouraged this situation with 85–90 per cent of retail being airside considered to be best industry practice (Steer Davies Gleave 2017).

Clearly the airport's influence extends beyond its actual boundaries by creating jobs and income in the local community as well as generating additional indirect (i.e. associated with the suppliers to the airport) and induced (i.e. associated with the spending of direct and indirect employees) effects. An airport may also encourage catalytic impacts (such as inward investment and tourism) in the local area but frequently these are likely to be more geographically spread, although much depends on the attractiveness of the actual surrounding area. Many airports have expanded beyond the boundaries of the traditional airport business by using neighbouring land for hotels, office complexes, trade centres, light industries, freight warehousing, distribution and logistics centres and business parks (Morrison 2009). As a result of this commercial expansion and diversification, multimodal and multifunctional businesses called airport cities can emerge (Reiss 2007, Perry 2013). If the Airport City continues to develop outwards, the boundaries between the airport and its surrounding urban area may become increasingly blurred, and a new urban form known as an Aerotropolis can appear (Kasarda 2013). Such developments can occur in a planned manner with development initiatives and government/regulatory support, or in a more organic manner, with companies reaping the advantages of agglomeration derived from the productivity benefits from being close to one another and from being located in large labour markets.

Characteristics of London Airports

There are five main airports that serve the London area, namely Heathrow, Gatwick, Stansted, Luton and London City, which are mostly operated by private companies. There are other airports that call themselves a 'London' airport, for example Southend which recently grew its business by offering low cost carrier (LCC) services, and Biggin Hill and Oxford that handle predominantly business jets and general aviation traffic. However, the traffic levels at these additional airports are very small in comparison to the main five.

Table 4.1 presents some key passenger characteristics of the major airports. The two runway Heathrow airport handles nearly double the passenger numbers of the next largest airport (Gatwick) and is unique in having more foreign than UK passengers, and a substantial share of transfer traffic. Heathrow is the principal gateway for many foreign leisure visitors, with the majority of long-haul passengers having no option but to arrive at this airport. Gatwick, Stansted and Luton serve predominately UK leisure passengers. LCCs dominate Stansted and Luton, attracting passengers of lower income. The smallest, somewhat niche, airport is London City airport, situated close to the financial centre of London, which attracts higher income passengers, many travelling for relatively short -distance and -duration business trips. It also has the only business-only flights to New York offered by British Airways and provides many business-focused features such as a Bloomberg hub and hotel/office bag delivery service.

The three largest airports (Heathrow, Gatwick and Stansted) were all owned by the same operator BAA (which was privatised in 1987 with a share flotation) until 2009 when the UK competition authority, formerly known as the Competition Commission, ruled that this common ownership be split up to encourage more competition (Competition Commission 2009). BAA completed its sale of Gatwick in 2009 and BAA's successor entity, Heathrow Airport Holdings (HAH), divested itself of Stansted in 2013. Heathrow and Gatwick are now owned by consortia of investment and infrastructure fund organisations, while Stansted is owned by the Manchester Airport Group (which also owns Manchester and East Midlands airport) with ownership being 64.5 per cent with local Manchester councils and 35.5 per cent with a private investment

	Heathrow	**Gatwick**	**Stansted**	**Luton**	**London City**
Passengers (000s)	75,169	42,146	24,060	14,583	4,501
Type (%):					
International	61	85	87	91	74
Domestic	3	7	7	7	24
Transfer	36	8	6	2	2
Purpose (%):					
Business	26	14	14	13	53
Leisure	74	86	86	87	47
Residency (%):					
UK	40	72	64	72	59
Foreign	60	28	36	28	41
Mean trip length (days)	9.6	7.3	5.8	6.8	4.0
Mean income	£55,639	£52,234	£41,682	£39,094	£66,683
Share of all UK inbound visitors (air/sea): Europe (%)	14	13	15	n/a	n/a
Share of all UK inbound visitors (air/sea): Rest of world (%)	62	13	3	n/a	n/a

Table 4.1: Passenger Characteristics at the Major London Airports 2016; n/a = not available but the percentages are smaller than at Heathrow, Gatwick and Stansted. Sources: CAA and International Passenger Survey.

fund. Since its opening in 1987, London City has always been run by private operators. Luton airport was handed over to a private operator in 1998 on a long-term 30-year concession, although the local council maintains ownership. This predominantly private management of all the major airports is relatively rare compared with many other countries, and has meant that achieving a good level of financial performance to satisfy investors has inevitably always been a key priority of the airports.

Largely as a consequence of BAA privatisation in 1987, Heathrow and Gatwick airports are economically regulated and licenced by the UK Civil Aviation Authority (CAA), because it has been determined that they have significant market power which could potentially be abused. At Heathrow there is a price control on the aeronautical fees that are charged to the airlines (CAA 2014a). Meanwhile since 2014 Gatwick airport has been licensed under a so-called Commitments Framework where the CAA monitors a series of commitments on price and other conditions that the airport operator has agreed with its major airlines (CAA 2014b). The other airports are not economically licenced by the CAA and so have total pricing freedom, with Stansted having been deregulated in 2014 after being judged as no longer possessing significant market power (CAA 2013). The regulatory regime at Heathrow airport also covers service quality, as the price control incentives that aim to reduce costs could inadvertently incentivise reductions in service quality. A similar mechanism has been embedded in the Commitments Framework at Gatwick airport. As regards non-aeronautical revenues, all regulated and non-regulated airports are effectively free from any controls, and so are provided with a strong incentive to increase these revenues.

Responding to Service Quality and Passenger Satisfaction Demands

In spite of this regulatory control of service quality, a decade or so ago the overall level of service quality at BAA airports, particularly Heathrow, was perceived as being very poor. Indeed McNeill (2010, 2859) stated that: 'In 2007 London Heathrow airport seemed, by all accounts, to be falling apart' and highlighted the various negative terms such as 'Heathrow Hassle', 'Deathrow', 'Thiefrow', and 'Flightmare' that had been used in the popular press to describe the airport. Moreover Stephens (2007) of the *Financial Times* stated:

> The depressing thing is the relentless predictability of it all. The interminable delays at security. The shuffling crowds in search of somewhere to sit as yet another flight is delayed. Worst, when you eventually escape you know the reprieve is only temporary. You will soon be flying back to broken travelators, long queues at immigration and mayhem in baggage reclaim. Welcome to Heathrow.

Other interested parties, such as the business lobby group London First (2008), went further by declaring that Heathrow's service deficiencies were having a detrimental impact on the attractiveness of London to business and investors. The situation was made worse by the disastrous opening day for the new Terminal 5 in March 2008 when flights were cancelled, luggage delayed and long queues developed. In 2007 within a sample of 101 airports worldwide, in terms of overall passenger satisfaction as measured by the ACI airport service quality (ASQ) survey, Heathrow was ranked a dismal 90th, Gatwick 75th and Stansted 74th. Security provision was a particular area of concern, especially after the introduction of liquid controls in 2006, and the relative rankings regarding securing queues satisfaction were very poor (97th, 93th and 98th respectively) (Competition and Markets Authority (CMA), 2016).

Various possible reasons for such low satisfaction levels (such as airport privatisation with inappropriate profit-maximising objectives, group ownership deterring competition, ineffective economic regulation) were widely debated. Subsequently this poor service quality performance was a major factor, amongst others, in driving some key changes at the airports. As already mentioned, Gatwick and Stansted were both sold to new owners, a new regulatory system was introduced in 2014, and both Gatwick and Stansted entered into long-term agreements with their main airline customers for the first time. At Heathrow the new Terminal 2 was opened in 2014, arguably setting new standards for the passenger experience, and also significant refurbishments to Terminals 3 and 4 have been made. The continuous construction works associated with Terminal 2, and before that with Terminal 5 (opened in 2008), undoubtedly did not help the image of Heathrow. At Gatwick capital investment levels increased after 2009 under the new ownership.

Whilst it is difficult to isolate the combined effects of these developments, and other factors influencing service quality, such as new technology and other operational initiatives, there is considerable evidence to suggest that the overall situation has improved, particularly since the splitting up of BAA (e.g. CMA 2016; ICF 2016; and OXERA 2016). Notably the ACI passenger satisfaction scores for Heathrow and Gatwick have risen considerably (Figure 4.1). In the problem area of security screening, 'very satisfied' passenger ratings at Heathrow increased from 52 per cent in 2008 to 70 per cent in 2015 (Department of Transport (DfT) 2016). By contrast at Stansted, deterioration in overall passenger satisfaction values was observed after 2013. This may well be due to the transfer of ownership in that year, which subsequently led to major investment and re-configuration of its terminal causing temporary significant passenger disruption during this time. CMA (2016) noted that these should, in the longer term, yield service improvement although a snapshot of five key passenger satisfaction measures for July 2017 and 2018 actually shows no improvement (Stansted Airport 2017; 2018).

A comparative assessment of the current service quality and passenger satisfaction levels at the five major London airports is provided with Table 4.2.

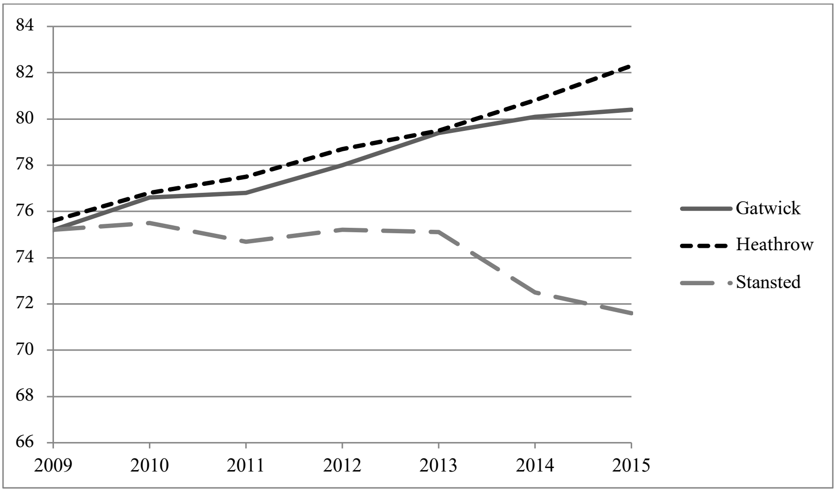

Figure 4.1: ACI ASQ Scores (converted to percentages) at Heathrow, Gatwick and Stansted 2009–2015. Source: CMA (2016).

A survey by the UK consumer association Which? shows highest levels of passenger satisfaction with London City, followed by Heathrow and Gatwick. This confirms the poorer perceptions of Stansted airport with Luton having even lower scores. Fairly comparable views have been found from the CAA airport surveys, although in this case Gatwick fares better. Similar rankings are seen with the Skytrax passenger ratings, which, as mentioned, is a global online air transport review site. Another measure of service quality is the overall delay to the flight. Generally, this correlates with the satisfaction levels, with the notable exception of Gatwick, suggesting that, in assessing overall service quality, passengers may separate experiences within the terminal from temporal ones associated with delays.

In aiming to provide a service primarily for full service carriers (FSCs), London City and Heathrow airports have many more facilities which can, arguably, encourage higher levels of passenger satisfaction. These FSCs will also tend to offer more at the airport because of their business model (e.g. airline lounges, more check-in desks). Passengers flying on LCC services have grown to expect a lower level of service on-board, although this has become more complicated recently by an apparent gradual convergence between the LCC and FSC models. The relevant issue here is whether LCC passenger expectations are lower in relation to the airport service levels as well. The lower satisfaction levels at Stansted and Luton seemingly suggest that this is not the case and some research has confirmed that passengers expect the same airport service whatever fare they pay (ORC International, 2009), even though airports serving LCCs will be under pressure to provide more cost-efficient and simpler facilities to suit

	Heathrow	Gatwick	Stansted	Luton	London City
Which? passenger satisfaction ratings	T5:61% T2:57% T3:52% T4:52%	North 51% South 52%	38%	29%	68%
CAA airport survey passenger experience ratings (% rating it as excellent or good)	89%	91%	82%	83%	91%
Skytrax passenger satisfaction ratings	4/10	4/10	2/10	2/10	5/10
Average flight delay (mins)	13.5	22.3	14.4	18.3	12.8

Table 4.2: Passenger Satisfaction Ratings and Flight Delay at the Major London Airports 2016/17. Sources: Which?, Skytrax and CAA.

the needs of this specific airline model. Moreover, Stansted was not initially designed with this type of traffic in mind and accommodating this traffic (and ensuring that there is appropriate retail and catering) has been a specific challenge and may perhaps contribute towards explaining its lower ranking.

Airports as Shopping and Leisure Destinations

There are a number of varied examples of the London airports acting as destinations in their own right. For example, both Heathrow and Gatwick host family fun days, as well as more specific events such as the recent LEGO tournament at Gatwick. Heathrow has its own permanent cultural space called T5 Gallery, as does Luton with its Gateway Gallery. Stansted has hosted a charity fun run along the runway whereas the Lord Mayor's Balloon Regatta was launched at London City airport in 2017.

Clearly a key role that the airports play is as shopping spaces, particularly Heathrow, being the largest of the London airports. Figure 4.2 shows that Heathrow airport generates a considerable amount of non-aeronautical revenue per passenger compared with other airports, ranking second in Europe (with Gatwick ranked fifth). Overall amongst 50 global airports Heathrow is ranked seventh (LeighFisher 2017). Although such data is very much dependent on traffic mix and passenger characteristics, one way of interpreting this is that the high spend is an indication of good service quality and an attractive range of non-aeronautical services. Alternatively, this larger than average spend could also reflect higher than average non-aeronautical prices. In tracking real net retail revenues per passenger through time (total non-aeronautical revenues in this format being not available) (Figure 4.3), there has been only very limited growth. This reflects the situation at a number of other airports where various external factors such as the economic recession, increased competition from internet shopping and more stringent security measures reducing dwell time, have diminished the ability of airport operators to increase their non-aeronautical revenues. Nevertheless, if the relationship between service quality and non-aeronautical revenue is strong, and given the significant perceived improvements in passenger satisfaction at Heathrow, it is somewhat surprising that there has not been more of an upwards trend in these non-aeronautical revenues.

When passenger satisfaction levels were poor at Heathrow in 2008 it was reported from stakeholder interviews undertaken by London First (2008, 36) that:

> Almost without exception, respondents (and especially those representing business stakeholders) indicated that there was too much space devoted to retail activities to the detriment of core activities directly related to the operation of an airport.

However, given the apparent improvements in survice quality, this may not be a reflection of current views. Some qualitative insight can be gained by looking at the specific Skytrax passenger reviews that focus on the non-aeronautical area

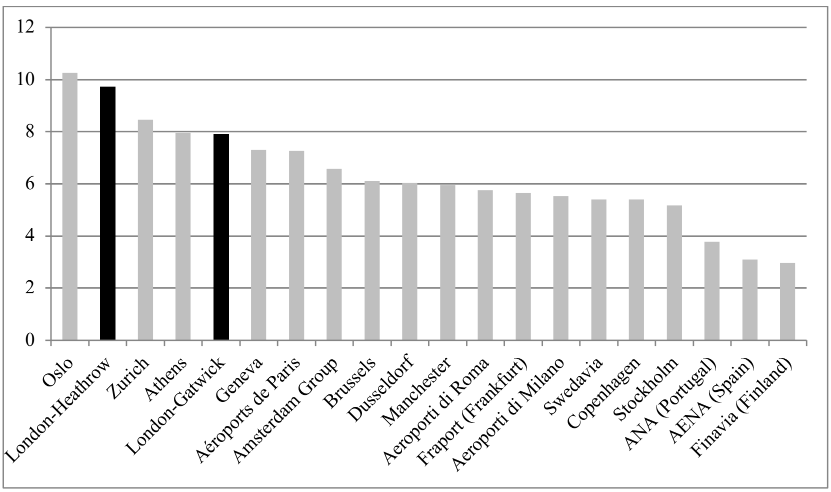

Figure 4.2: Non-Aeronautical Revenue per Passenger 2016 (£s*) Source: LeighFisher (2017).
*converted using Special Drawing Rights (SDR).

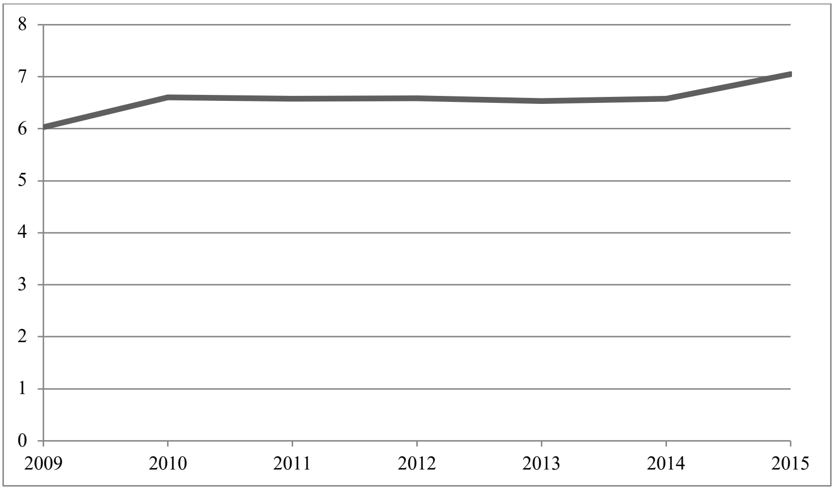

Figure 4.3: Net Retail Revenues per Passenger at Heathrow 2009–2015 (£ – 2015 prices). Source: Steer Davies Gleave (2007).

(although acknowledging that these are voluntary responses from an unrepresentative sample that will tend to pick up only extreme and predominantly negative views) (Appendix 4.A). The varied content of the comments is as expected given passengers' different preferences for shopping, and there are a number of favourable remarks related to the range of facilities and the shopping experience. However, these are outnumbered by negative comments concerning the high prices of goods, the excessive space allocated to retail and its interference with the operational and functional role of the airport. There is some evidence that certain passengers are far from satisfied with the non-aeronautical aspects of the Heathrow airport journey. This mirrors some of the criticism of retail in general in London, where there are thought to be too many shops, significant challenges due to changing technology and shopper habits, and a need for retailers 'to re-think and integrate the experience they offer in physical stores and invest in better customer journeys' (Stevens 2017).

Representing Gateways to London

Having highlighted some important findings related to airport service quality and its role as a shopping destination, this can now be developed further by focusing on the overall passenger experience at Heathrow and its specific role as a gateway to London for inbound visitors. After the dismal service quality ratings of 2007 and 2008, there was increased interest in the overall passenger experience concept, which had previously received little attention. Research at this time emphasised the improvements required in the door-to-door journey experience (DfT 2007), the need for the consideration of a range of softer factors that could not be measured with the typical service-quality measures (Sykes and Desai 2009) and the importance of assessing the interfaces of the different service providers (CAA 2009). A number of these issues were subsequently considered by the airport operator, the CAA, and other interested organisations.

Specifically, in 2009, Heathrow launched a new brand identity with the tagline 'making every journey better' and has continued to promote this message. Initiatives have included introducing multi-lingual 'journey ambassadors' (dressed in the Heathrow brand purple colour), new Central London advertising campaigns, the launch of a mobile app, TV Christmas advertising and other areas of innovation, such as family lanes in security, and more themed events – a recent example being children's activities based on the popular Mr Men books. However, it is difficult to assess the impact of these softer elements of Heathrow's service provision. Two recent comments on Skytrax expressing very contradictory views about the journey ambassadors provide a good example:

> 'What I like most about Heathrow were the staff especially the purple coated helpers whose job is to assist and guide passengers'
>
> 'As for the "purple people" Heathrow staff who seem to do nothing but scowl - what do they actually do?'

Moreover, the journey ambassadors were subject to a recent UK TV documentary that heavily criticised the fact that they were paid commission to direct passengers to the airport's shops with sales targets to meet (around £2,500 a day: Ellson 2017). Such reporting clearly reinforces the views expressed by some in the Skytrax reviews that the airport focuses too much on exploiting its retail opportunities.

In terms of specifically helping inbound visitors, the airport operator has developed a part of its website called 'First Time in Britain' where it has information about the language, weather, driving, doing business, opening hours, public holidays, money, time zones, distances/measurement/sizes, food and drink, tipping, electricity and telephones. Details of surface transport links are provided, although again there has been some criticism of the airport's push to grow revenues, by very much focusing on its own Heathrow Express train service in contrast to the cheaper Heathrow Connect option which is jointly provided by the airport operator and the Great Western Railway train operator (CAA 2016). Like many airports, Heathrow also organises joint promotional activities and other events with the travel trade. A recent example in 2017 was a joint initiative with VisitBritain as part of their GREAT Britain campaign to build awareness of Britain's attractiveness as a tourism destination by showing over 200 artworks. These displayed a mix of heritage sites, pioneering British businesses, and cultural attractions across the UK.

Assessing the impact of such initiatives is hard to measure. The Skytrax comments, whilst again acknowledging the methodological shortcomings, can nevertheless provide some qualitative insight (Appendix 4.B). The comments indicate that these passengers feel the airport is an integral part of the visit or holiday experience and should be providing an ambassadorial role for London. However, the reality seems to be that a number of these passengers were left with a less than favourable impression and welcome.

Anchors for Wider Development

Heathrow, as with most airports, has a significant role in the wider local community. According to the latest employment survey, it generates more than 75,000 direct jobs at the airport with around 54 per cent of these coming from the five closest local London boroughs that border the airport site (Hounslow, Hillingdon, Ealing, Slough and Spelthorne) (Heathrow Airport Ltd 2014). The direct local jobs account for around 16 per cent of total local employment in this area and if the indirect and the induced jobs are added in, this accounts for up to 22 per cent of local jobs (Optimal Economics 2011). The catalytic or spin-off impacts related to tourism, or the role of the airport in facilitating tourism, are much more widely felt in London and beyond. The actual local catalytic impacts at Heathrow are very difficult to quantify (PWC 2014) and there is no certainty as to whether all local tourism opportunities are really exploited, as the following Hillingdon Council (2007, 40) statement (albeit more than ten years ago) suggested:

> visitor perception to the area is very limited, with the result that visitors are missing out on opportunities to visit and experience other places and services.

The local area around Heathrow can also be attractive for conferences and meetings (and indeed other events) as explained in the promotional message of a meetings organiser (meetingpackage 2017):

> With more than 27 million business travellers in 2015, the airport offers a great opportunity to … save some of your precious time. And money. Just give it a thought. Why hold a meeting or a conference with more than 50 people from all around the world (or not) in a place out of the airport where they initially land? Your clients or business colleagues will already be there. You'll avoid additional costs, traffic, save some time and be productive.

Whilst demand-side data related to this is scarce, a quick internet search reveals some indication of the level of supply. The conference organiser *Conferences UK* had venue partnerships in place with 18 meeting venues in the Heathrow area with over 51,000 meeting rooms to choose from, while the *Venue Directory* had 33 matches for the vicinity.

Many of these facilities are offered by accommodation providers, which are one of the key sectors in the local community that benefit from Heathrow's presence. The area around Heathrow has around 150 accommodation establishments accounting for over 15,000 rooms and making up 11 per cent of the total accommodation stock in London (London and Partners 2017). Traditionally many of these tended to be rather exclusive and upmarket but with factors such as changing lifestyles, cheaper long-distance travel and the growth of budget hotel chains, there is now much more cheaper accommodation available (as in other parts of London). In Hillingdon, there were 42 hotels (9,701 rooms) in 2016 and although 64 per cent of these were 4–5 star, budget hotels represented a significant proportion (19 per cent) (London and Partners, 2016), with notable new additions to the stock including IBIS Styles (140 rooms) in 2016 and the Premier Inn (613 rooms) in 2017.

The majority of the hotels and their facilities are designed to meet the needs of passengers (both origin/destination and transfer) using the airport, but they can also be used for local demand (e.g. VFR, business, and for special events in West London). They are a necessary condition for the development of both the local tourism and events industries. In addition, Heathrow has traditionally been one of the main overspill accommodation areas when central London is full but the local hotels now face more competition with the growth of the cheaper hotel stock in the outskirts in other areas of London, particularly in the East. Much of London's development is in an easterly direction and with the development of key visitor attractions close to areas such as Queen Elizabeth Olympic Park and Stratford, together with the popularity of venues such as the O2 Arena and ExCeL centre (and closure of Earls Court in the West), spreading the London destination westwards is challenging.

There may be visitor perception issues as identified by the Royal Borough of Windsor and Maidenhead (RBWM) (2017, 15):

> There is a risk that some overseas visitors are deterred from staying in RBWM because they perceive it to be easier to travel into Central London, losing potential revenue. There is a concern that visitors from overseas (including those coming to the UK for business) do not appreciate the proximity of Windsor to Heathrow (7.2 miles) and consider it easier to use London hotels as a base. This suggests an opportunity to reposition the destination to make its proximity to London much clearer.

As a result of its tourism plan of 2017-2020, Windsor and Maidenhead propose a rebrand to ensure that its proximity to London and Heathrow is fully understood. Heathrow's surface transport connectivity will be improved significantly with the opening of the new east–west Elizabeth Line (also known as Crossrail) which will replace the existing Heathrow Connect service probably in 2020, although this is will be over a year later than originally planned with a substantially higher cost. This may enhance Heathrow's position as a gateway to London by making it easier to directly access more parts of London and in turn may stimulate more catalytic development. Arguably this could have a positive or negative impact on tourism and events in the local area, on the one hand making it easier for people to stay in the area and travel into London, but on the other hand making it easier to bypass the area altogether. In the longer term a connection with the planned high-speed HS2 via an interchange with the Elizabeth Line may also be an option.

It is also worth noting that because of Prince Harry's and Princess Eugenie's weddings at Windsor in 2018, Windsor and the surrounding area experienced a considerable boost to its tourism industry which may linger afterwards. Indeed, on the tourism page of the Royal Borough of Windsor and Maidenhead website it is stated: 'If you were inspired by what you saw on television then come and experience the Windsor Welcome for yourself! There has never been a better time to visit!' (Royal Borough of Windsor and Maidenhead 2018). Even nearby Slough, close to Heathrow but 'not a typical tourist hotspot' may benefit from the extra exposure that it received at a time when there has been considerable regeneration investment for the town (Fishwick 2017).

There is evidence of new development being planned around Heathrow airport which may enhance the wider economic impacts. For example, the West of Borough area of Hounslow was designated by the Mayor of London in 2015 as a so-called Opportunity Area for significant business growth and housing development with improved public transport access. Within this area, Hounslow Council has proposed the development of a new urban quarter which will include Heathrow Garden City with new homes, a Heathrow Gateway business hub and an Airport Business park which is currently under consultation.

Overall, in acknowledging the impact that Heathrow airport has on the local community, this raises the issue as to whether Heathrow can be considered as an Airport City or Aerotropolis. A clustering of hotel and conference facilities, together with a concentration of business activity in areas such as Stockley Park and Uxbridge Business Park, suggested to Kasarda (2013) that it could be. However, this development has occurred in an organic fashion (as indeed has the development of the airport), which is in stark contrast to Manchester where a different local and regional context has led to the development of the UK's first planned Airport City. This has a total area of 500,000 m^2 to be occupied eventually with offices, hotels, advanced manufacturing, logistics facilities, and ancillary retail space (Manchester Airport Group 2017).

Finally, in considering the implications for wider development, mention must be made to plans to expand the capacity of the London airports. Undoubtedly the most important issue here has to be where to build an additional runway which has been fiercely debated over many years. Most recently, the independent Airport Commission considered all the options, narrowed this down to two at Heathrow (an additional runway to the north west of the existing runways or a new extended runway to the west of the existing northern runway) or one additional runway at Gatwick, and eventually recommended the new additional north west runway at Heathrow (Airports Commission 2015). The UK government has accepted this recommendation as part of the Airports National Policy Statement (DfT 2018).

The other major London airports are also planning expansion, with a significant development at London City airport providing for two million more passengers by 2025. Originally these plans had been opposed by the previous mayor Boris Johnson but the current mayor, Sadiq Khan, controversially dropped this objection shortly after being elected in 2016 – even though he had pledged to be London's 'greenest' ever mayor. Luton airport published growth plans in December 2017 which could double the number of passengers by 2050. The proposals are still subject to planning permission but include a so-called New Century Park aiming to encourage business development and employment opportunities, together with enhanced community facilities, within the neighbourhood of the airport. Stansted airport is also planning expansion although needs to get planning permission to raise the cap on annual passengers.

Conclusions

This aim of this chapter was to consider the role of London's airports as experiences and destinations. It is argued that the London airports can act as:

1. Destinations in themselves where people do more than simply use transport facilities (e.g. they use retail and leisure facilities).
2. Gateways to London, providing the first impression of London and the first part of this destination experience.
3. Anchors for the development of a wider destination area (e.g. Windsor and Maidenhead).
4. Transport nodes that can assist the development of nearby surburban destinations (particularly with new links such as the Elizabeth Line and HS2).

Looking forward, there are a number of key factors that are likely to have a major impact on London airports and the subsequent balance of these four dimensions. Undoubtedly the most significant of these will be the development of a third runway at Heathrow. Although in principle this has been approved, a considerable amount of opposition remains, particularly on environmental grounds, which is likely to lead to legal challenges associated with this government decision. If these are unsuccessful, the earliest possible date for the third runway would be 2026.

If there is this increase in runway capacity, Heathrow's ability to perform its role as the primary gateway to London could be enhanced, with airlines more able to develop new routes, especially from long-haul destinations in emerging economies with growing tourism demand which have been squeezed out of Heathrow at the moment. If, for whatever reason, the runway is not built, which is not totally improbable given past failed attempts, Heathrow's ability to position itself as one of the world's global hubs is likely to be challenged. Actually, this is already happening, not only because of capacity constraints, but also as the major air transport markets move eastwards and consequently make Middle Eastern and Asian hubs more popular. While a weakening of a hub function is likely to affect the feasibility of certain routes, it is difficult to conceive that Heathrow will not remain the major origin and destination airport for visitors to London, even though lack of capacity could cause some displacement of leisure passengers to other airports, with business visitors being prepared to pay a premium for access to Heathrow. This could then have an impact on other smaller London airports, perhaps putting more pressure for the need for service quality enhancements, particularly at Stansted and Luton, where currently passenger satisfaction appears to be relatively low.

Meanwhile, by contrast, most evidence points to improvements in service quality levels at both Heathrow and Gatwick over the last ten years. Moreover, an interesting proposed change for 2020 onwards, announced by the CAA, will be the way that service quality is regulated at Heathrow. The plan is to shift to an outcome-based approach that focuses on considering what airports are actually delivering to users rather than how they deliver it – hence moving closer to the passenger experience concept (CAA 2017).

The forces explaining the differences in service quality at the different London airports are undoubtedly complex. Privatisation, with a profit maximising objective, is an obvious factor, but all five major airports have been under private management for some time. Some (Heathrow, and Gatwick/Stansted up until recently) have had their service quality officially regulated whereas the unregulated airports (London City and Luton) are ranked top and bottom and so it is difficult to detect a causal relationship here. Evidence does, however, suggest that the splitting up of BAA has played a major role in improving quality standards at Heathrow and Gatwick as the airports face more competition. On the other hand, the lower–performing Stansted and Luton airports likewise operate in a fairly competitive environment, which suggests their focus on serving the LCC airline model may play a key role here in influencing service levels.

The Skytrax reviews indicate that many passengers are unhappy with the non-aeronautical facilities or shopping experience at Heathrow. One possible way to increase passenger satisfaction could be to fully embrace the use of technology and simplify the retail experience, especially with navigational tools for shops, and the availability of online purchases and ordering. Such developments are in line with general retail trends and have been partially embraced by Heathrow airport but potentially could be exploited more. This could perhaps reduce some of the criticisms which relate to shopping physically dominating the airport experience. The reviews also suggest that Heathrow is not always viewed as a good ambassador for London. It is noteworthy that many of the airport's initiatives such as loyalty programmes, car parking packages with hotels and events like the Mr Men initiative are much more attractive to outbound UK residents, rather than inbound visitors, which is possibly where more consideration could be given, especially as UK residents only account for 40 per cent of the traffic. As discussed earlier, the relative mix of inward and outward passenger flows must be a key consideration when commercial services and activities are being planned.

In looking to the future, it is clear that the Heathrow third runway, but also other expansion plans at the other airports, offer significant opportunities to enhance the visitor experience in the long term, although the more short-term disruption needs to be very carefully managed. Inevitably all these plans are being vehemently opposed by certain resident groups and environmentalists but, if they all do go ahead, they may have the ability to unlock additional capacity and help a bit to disperse the benefits that airports can bring as destinations, gateways and anchors for development around a greater area of London.

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Appendix 4.A: Skytrax Passenger Comments About Non-aeronautical Revenues.

POSITIVE	NEGATIVE
RANGE OF SHOPS	
'On the way out I was astonished by the range of shops after passing security.' 'Lots of shopping and a few coffee shops with some restaurants mixed in'. 'There were plenty of shops inside such as restaurants and duty free'. 'There were more than enough options for eating and shopping at the airport'. 'There are plenty of shops airside if you wanted to make some extra purchases before you flight. There are also plenty of eateries'. 'Well-equipped for shopping and restaurants'. 'Plenty of choice for food because there were so many restaurants and shops'. 'The airport has an excellent selection of shops and restaurants'. 'Brilliant selection of food and retail outlets'. 'Food and duty free selection is impressive'. 'Excellent facilities for shopping and eating'.	'The airport is more like a big mall rather than an airport'. 'I am fed up with the ridiculous amount of expensive stores that clutter the entire terminal and cause traffic bottlenecks'. 'Airports are not shopping centres. It's a shame that LHR is only interesting in profiteering through rent from retailers.' 'Why anyone would rate an airport high because the shopping is good baffles me'. 'Who goes to an airport to shop?'.
TYPES OF SHOPS	
	'Shopping is too high end.' 'Still find it strange this airport wins an award for shopping. For the normal commuter or traveller it only has high brand companies in T2 and T5 which are the most up to date terminals'. 'It's all very well having luxury handbags, jewellery and other high value items available, but does it really appeal to the majority of passengers?'. 'Shopping is pretty dismal too – I don't understand all those empty designer stores'. 'Why not cater for ordinary people with ordinary budgets?'.

POSITIVE	NEGATIVE
	‘The shopping seemed far too expensive for me even to venture into some of the stores’. ‘Travellers from certain countries may have money to indulge in luxury items, but I believe most would want a last minute memento of their holiday knowing they wouldn’t face a huge credit card bill when returning home’.
THE SHOPPING EXPERIENCE	
‘I also love the shopping features and terminal layouts’. ‘Terminal is spacious and has good selection of shops and eatery’s airside.’ ‘That said our dining experience was utterly superb’. ‘Loads of shops/places to eat but still never feels crowded and noisy even at peak times’. ‘Was a fine experience with good shopping possibilities’. ‘Duty free and departure areas nice and open plenty of food and shops everywhere.’ ‘Terminals are clean well decorated and for the most part have excellent shops!’.	‘Overall my thoughts of Heathrow is that they want my money but forget what the passenger actually wants or how we wish to be treated’. ‘This terminal is starting to feel and looks like a Shopping Mall’. ‘The airport management at senior level should decide what is more important a stress-free passage for passengers through security or to continue to open more retail outlets. At the moment it appears that the emphasis is to get passengers to spend more at the retail outlets than to establish a stress-free passage through security’. ‘Too much like a shopping mall and always unpleasantly overcrowded and noisy’. ‘Policy on using most of the space for shopping really does make using LHR terminals a depressingly uncomfortable experience’.
PRICES	
	‘However the duty free area is just another gilded souk. Every time that you try and stop to have a look at something, an aggressive sales shark will pounce upon you. I was stopped 11 times’. ‘Should you have the misfortune of having to buy something, you are harassed into buying other products. It’s an absolute headache and a very unpleasant experience. They lost money from me. Staff are not even qualified in their concessions. Clearly everyone is on targets and minimum wage. It’s horrible’.

POSITIVE	NEGATIVE
	'Seeing the amount of space the airport authorities devoted to shopping versus passenger security clearly you consider passengers cash cows'.
COMFORT	
'Large variety of restaurants and cafes and also has a spacious terminal'. 'The shopping area was pleasant and we didn't have trouble finding somewhere to sit'.	'The Duty Free area is way too large and the prices not at all that competitive: area should be halved for more comfort and seating places'. 'There are more shops than are really needed, and for passengers less places to sit and rest before a long flight'. 'They want passengers up and spending money. I found the seats to be not very comfortable and less uncomfortable the longer you sat on it'. 'There is now so much focus on retail areas with little or no thought for the average traveling passenger. …so much space is now taken for retail that there is little space to sit down without feeling overcrowded'.

Appendix 4.B: Skytrax Passenger Comments about the Passenger Experience

POSITIVE	NEGATIVE
ROLE WITHIN THE OVERALL VISIT	
'It's a really lovely way to start a holiday'. 'All in all a very pleasant start to our holiday'.	'Not a good way to start our vacation'. 'The start of our holiday has been a shambles with no apology'. 'A bad experience all around and a lousy end to a holiday'. 'It was an appalling experience that spoilt the start of my holiday of a lifetime'.

POSITIVE	NEGATIVE
WELCOME TO LONDON	
	'It is the primary Gateway to London and Britain. What an awful welcome'. 'What a way to be welcomed to London and the UK!'. 'Dirty crowded expensive and inefficient. A microsome of most things in London. Nicely reflects what to expect from England as a visitor'. 'Did I mention the airport is dirty? I have noticed on the London subway that the locals just leave trash everywhere but in trash cans and they do the same at Heathrow'. 'The passenger's first taste of London and it leaves an unsavory taste for the entire country'. 'I was shocked to see this attitude from someone who was my first point of contact with London'.
WELCOME TO THE UK	
'Overall had a very satisfying experience there and a fantastic welcome to the UK'.	'Everyone was tired and then they are subjected to this - a far cry from a good welcome to the UK'. 'Heathrow is supposed to be the gateway to our country and should show respect and be pleasant to travellers and not treat them like cattle'. 'I did not feel welcome at all to the UK with that queue and do not recommend coming back!'.
	'Clearly woefully understaffed – what a welcome to the UK for foreign visitors'. 'My husband, who'd not been to England before, swore never to go there.' 'It makes me think twice about spending my tourist dollar in a country that apparently just doesn't care'.

POSITIVE	NEGATIVE
IMPRESSIONS	
	'What a bad impression it must give visitors to the UK'. 'The old saying "You never get a second chance to make a first impression" is unknown by Heathrow'. 'What sort of advertisement is that for a visitor to "Great" Britain?'. 'Just imagine what impression this gives visitors to this country the moment they arrive here'. 'Welcome to Britain. No matter how much money the English Tourist Board spends on promotion it's the initial impression that counts'. 'What impression do they give to overseas travellers to our country?'. 'Why can't we get basic courtesy right? First impressions count'. 'Place is a joke. As a Brit, it's frankly embarrassing'. 'I am embarrassed for what visitors will think of Britain'. 'An embarrassment to be British if this is people's first impression of the UK'. 'Few airports are fun but this really gives a poor impression of this country to visitors'. 'I truly feel sorry for tourists entering England for the first time and having to encounter the human zoo'.