



# AIRPORT SERVICE QUALITY

BENCHMARKING THE GLOBAL AIRPORT INDUSTRY

## Best Practice Report

### Managing Waiting Times



# Introduction

Each year best practices from top-performing airports are identified and disseminated around the world through the ASQ Best Practice Reports. These supplementary analyses are part of the ASQ Survey's additional services and focus on specific topics, aiming to initiate further discussion between ASQ participants.

The data used for this Best Practice Report was collected through an online questionnaire distributed to all ASQ Survey participants. All information was gathered between May and October 2012 and ASQ results from Q4 2011 to Q3 2012 have been used for supplementary analyses. The full report along with individual airport profiles is only shared with airports which participated in the Best Practice Survey.

This report is about managing waiting times and covers three main aspects:

- ➔ How airports can impact passenger perceptions of waiting times?
- ➔ How airports can influence actual waiting times?
- ➔ Future plans to better manage waiting times



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## Survey Participants - 124 in total

### Africa - Middle East - Asia (38)

Abu Dhabi, Auckland, Bangkok BKK, Beijing, Brisbane, Cairns, Cairo, Chengdu, Chiang Mai, Dammam, Darwin, Doha, Douala, Dubai, Gold Coast, Haikou, Hangzhou, Hohhot, Hong Kong, Hyderabad, Johannesburg, Kuala Lumpur, Macau, Male, Mauritius, Nairobi, Nanchang, Newcastle, Palembang, Riyadh, Shanghai SHA, Shenzhen, Siem Reap, Singapore, Tel Aviv, Tianjin, Tokyo NRT, Wuhan

### Americas (36)

Acapulco, Atlanta, Austin, Calgary, Cancun, Cincinnati, Ciudad Juárez, Cochabamba, Columbus, Denver, Detroit, Fort Lauderdale, Guayaquil, Halifax, Indianapolis, Jackson, Jacksonville, La Paz, Memphis, Minneapolis, Montreal, Nassau, Ottawa, Port of Spain, Punta Cana, Quebec, Reynosa, Salt Lake City, San Francisco, San José, Santa Cruz, Santo Domingo, Saskatoon, Seattle, Tampa, Victoria

### Europe (50)

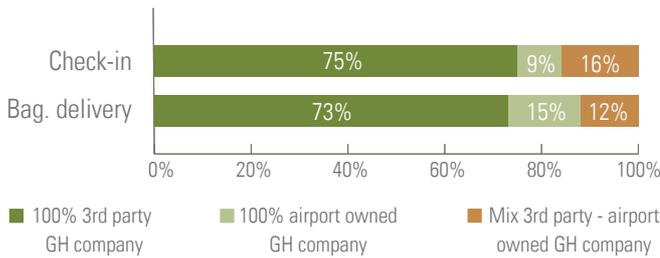
Aberdeen, Amsterdam, Barcelona, Bergen, Bodo, Bristol, Brussels, Bucharest OTP, Budapest, Copenhagen, Edinburgh, Faro, Frankfurt, Geneva, Goteborg, Hamburg, Helsinki, Keflavik, Lisbon, London LGW, London LHR, London STN, Lyon, Madeira, Madrid, Malmo, Malta, Manchester, Milan LIN, Milan MXP, Moscow DME, Munich, Naples, Ohrid, Oslo, Paris CDG, Paris ORY, Ponta Delgada, Porto, Rome FCO, Skopje, Southampton, Stavanger, Stockholm ARN, Stockholm BMA, Trondheim, Venice, Vienna, Zagreb, Zurich

# Overview

How waiting times are managed has a real impact on passenger satisfaction: in general the longer a passenger has to wait, the lower the ASQ score given to the airport. In other words, there is a negative correlation between waiting times and overall satisfaction.

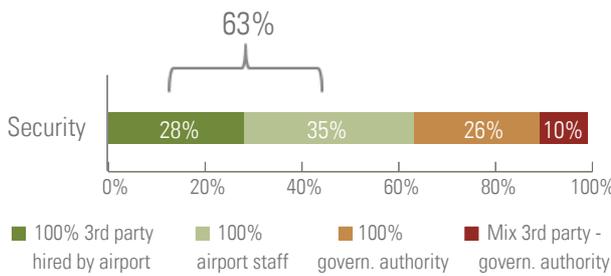
Managing waiting times is not always easy when it is not always airport staff managing the processes.

## Who is performing check-in and baggage delivery activities at your airport?



Less than 10% of respondent airports manage their check-in process, and only 15% manage their baggage delivery process. In such cases, it can be quite complicated to directly influence the way of managing waiting times.

## Who is performing passenger security activities at your airport?



The trend is less extreme for the security process as in 63% of the cases airports can have a direct impact on the way of managing waiting times.

There are three main ways of impacting actual waiting times at an airport:

- By opening more counters / lanes
- By increasing the number of staff available
- By improving the efficiency of the process, which means improving not only the efficiency of the staff (through training for instance) but also the efficiency of the machines

To optimize the airport processes, that is knowing how many counters to open and how many employees to make available at different times of the day, it is necessary to do waiting time measurements in order to be able to define quantitative standards. This will be covered more deeply in the following sections of this Best Practice Report.

Most of the time, airports are limited by space, financial and human resources. In such cases passengers have to wait anyway at the different processes. However, airports can try to influence the perceived waiting time, that is the waiting time the passengers think they actually spend in the different queues.

There are three main ways of impacting perceived waiting times:

- By clearly organizing the waiting lines
- By providing approximate or maximum waiting times
- By entertaining passengers while they are queuing

These will be discussed in the next sections of this report.

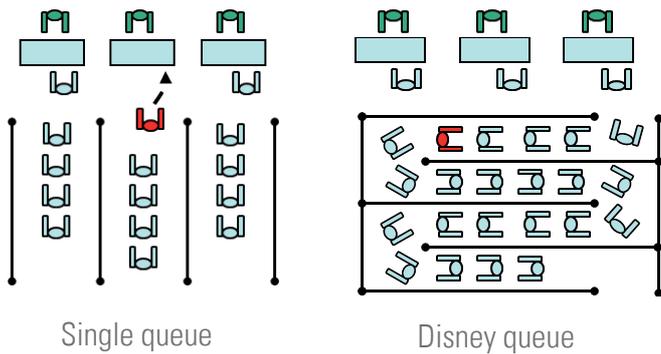
# Perceived waiting times

It is possible to influence perceptions of waiting times through better organization of the queues.

## Queue organization

There are two main ways of organizing waiting lines:

- Single queues
- Disney queues



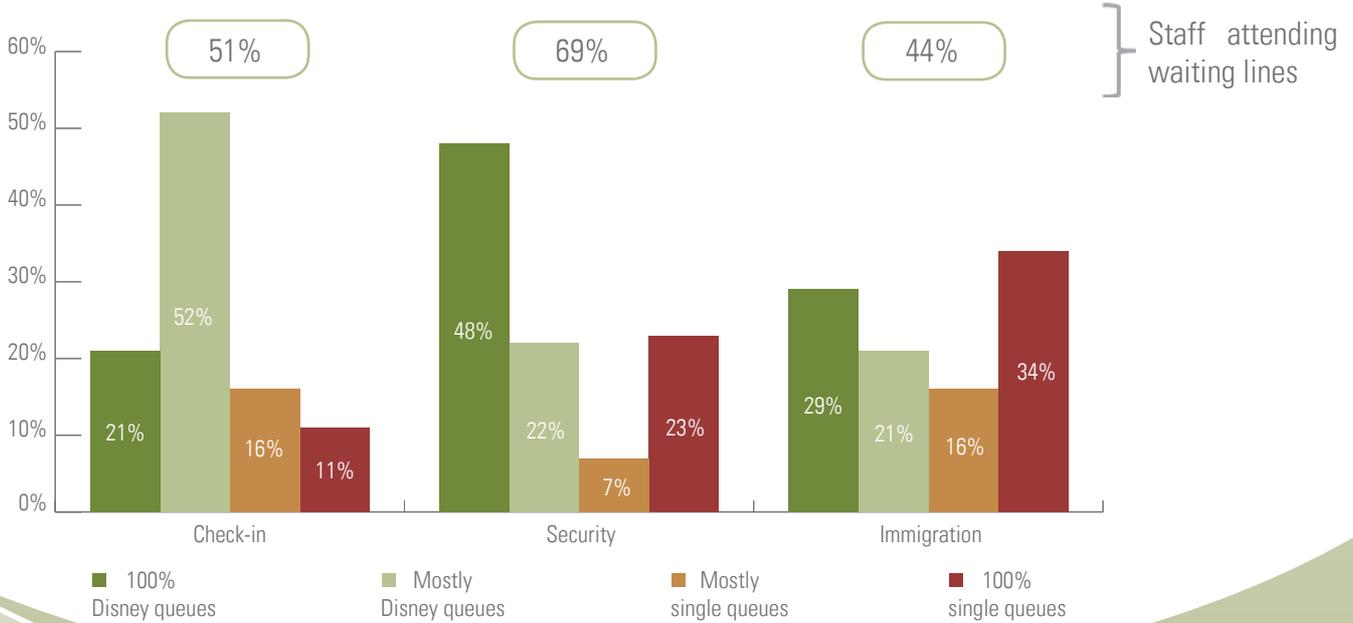
Single queues are easy to manage but can create a feeling of unfairness if passengers who are waiting in the other lines advance faster. This feeling of unfairness is not experienced by passengers in a Disney queue as everyone stands in the same line.

In terms of perceived waiting times, Disney queues are preferred by the passengers as this type of organization makes them move forward continuously. On the other hand, Disney queues require more control to maintain order and to direct passengers to available counters.

Respondent airports mostly use Disney queues for check-in (73%) and security (70%). For immigration, half of the participating airports tend to use Disney queues and half tend to use single queues.

Where Disney queues are mostly used, that is at check-in and security, is also where there is more staff attending the waiting lines. It seems quite logical because, as said earlier, Disney queues require more control than single lines.

## How are the waiting lines organized at your airport?



## Indicating waiting times

Another way of impacting the perceived waiting time is to give the passengers indications of how long they will have to wait.

The first way is through static indicators. Signs displayed along waiting lines or average waiting times communicated on the airport website are typical static indicators for example.

An airport in Europe has a good way of informing the passengers of how long they will probably have to wait at the different processes through static indicators. Indeed, they provide their quarterly average waiting times on screens and signs in the airport terminal, and on slides on their website and Facebook. That way, passengers can estimate approximately how long they will have to wait at each step and organize their time accordingly.

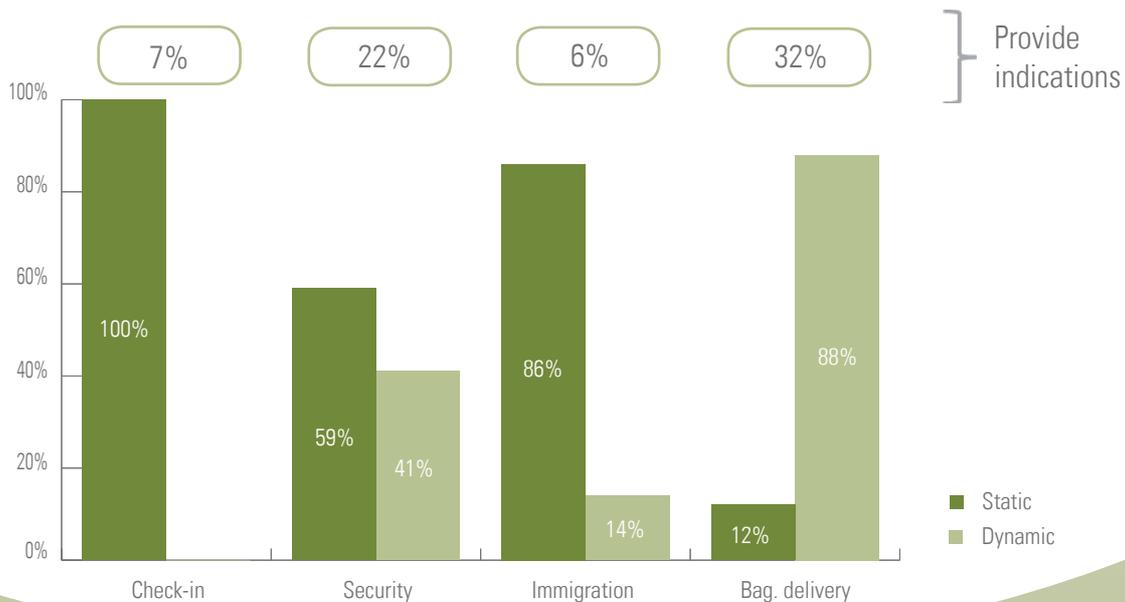
The second way of providing waiting time duration indications is through dynamic indicators. That is through regularly updated, real or estimated waiting times displayed on screens or through baggage delivery screens showing the status of the delivery.

Another European airport has an excellent way of providing dynamic indications: they developed an application which is downloadable onto smartphones. Once the application is activated, the passenger can see a webcam at security. He can check if the security area is crowded and then evaluate how long would be the expected waiting time.

Almost no participants provide waiting time duration indications at check-in and immigration. It seems to be more common at security and baggage delivery as 22% and 32% respectively of the respondent airports provide indications at these processes. However, most airports do not provide any waiting time duration indications at all.

The majority of the airports that provide waiting time duration indications use static indicators, except for baggage delivery service where most of the participants provide dynamic indicators (88%).

### Trends in providing waiting time duration indications



## Entertainment / distractions

The last way of impacting the perceived waiting time is providing entertainment for passengers while they are queuing.

Airports can implement different types of distractions to entertain the passengers and reduce the perceived waiting time. We have found three main categories:

- Process related media
- Other media
- Non-media

Process related media consists of informing the passengers about airport processes through displays or virtual assistants.

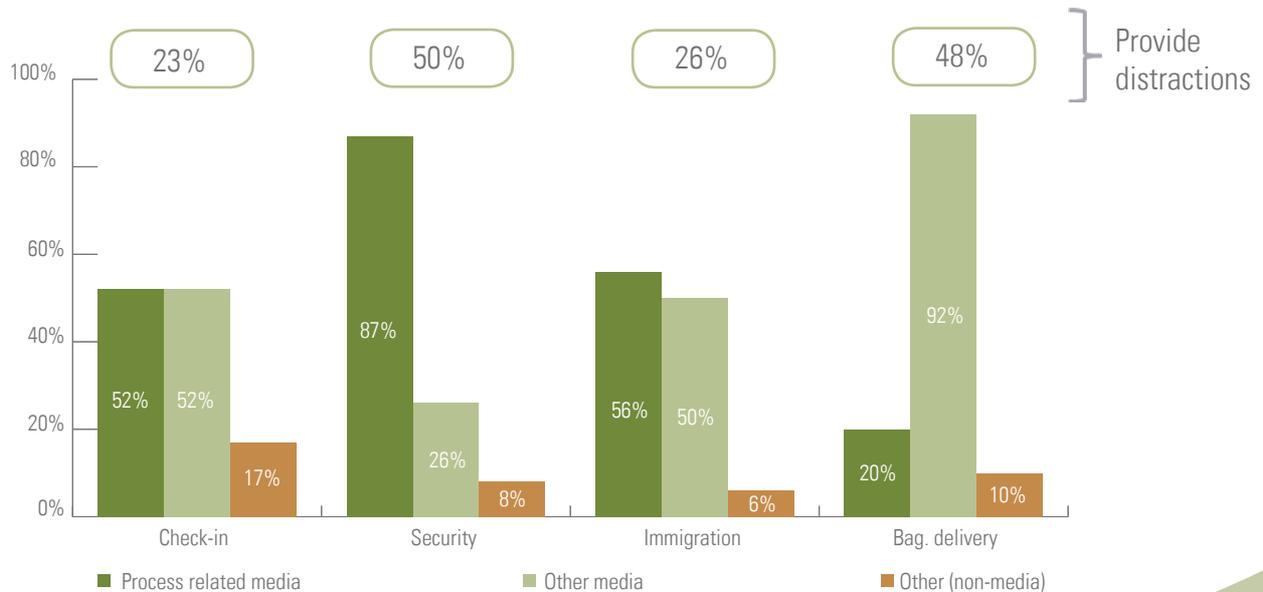
Other media groups all kinds of media that are not linked to the airport processes. Advertisements on television, internet stations or media art installations are included in this category.

All other kinds of distractions that are not linked to the airport processes and that are not displayed through any kind of media are aggregated in the last category. Live performances and cultural displays are examples of this category.

A famous airport in Europe is a good example of this last category: they entertain the passengers often with live performances at different areas of the terminals, and it seems to be highly appreciated by the passengers.

Another good example is a second European airport: they have covered a whole wall with the score of a very famous local song to produce what they call their "music paper wall". It is an effective way of distracting passengers while they are queuing as most of them read the score while they are in line.

### Trends in providing entertainment / distractions



Less than a third of respondent airports provide distractions at check-in and immigration. This way of reducing the perceived waiting time seems to be more common for security and baggage delivery as almost half of the participants (50% and 48% respectively) entertain the passengers at these processes.

The most common way of distracting passengers is through process related media at security and immigration. Most airports give specific information about the process on screens.

Airports usually distract passengers with all types of media at check-in.

At baggage delivery, almost all respondent airports use media not linked to the process such as television displays to entertain passengers.

Despite good responses from the public, globally live performances seem to be used by very few airports. This is largely due to security issues, cost and difficulty in maintaining high standards.

## Actual waiting times

Airports can try to impact actual waiting times by optimizing their processes. To be able to do that, it is first necessary to measure actual waiting times.

### Waiting time measurements

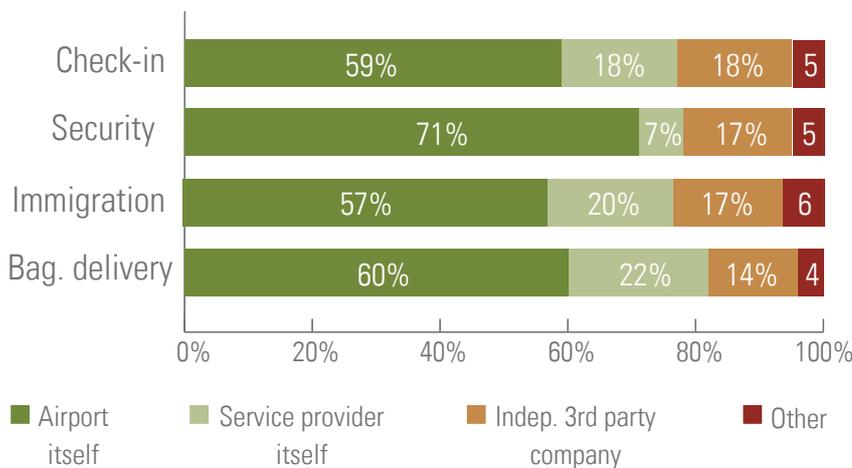
Most of the airports which participated in this best practice survey measure waiting times: almost two thirds of the respondents measure waiting times at check-in and immigration, and more than 70% of the participants measure at security and baggage delivery (77% and 71% respectively).

At each process, measurements are usually done by the airport staff.

Waiting times measured

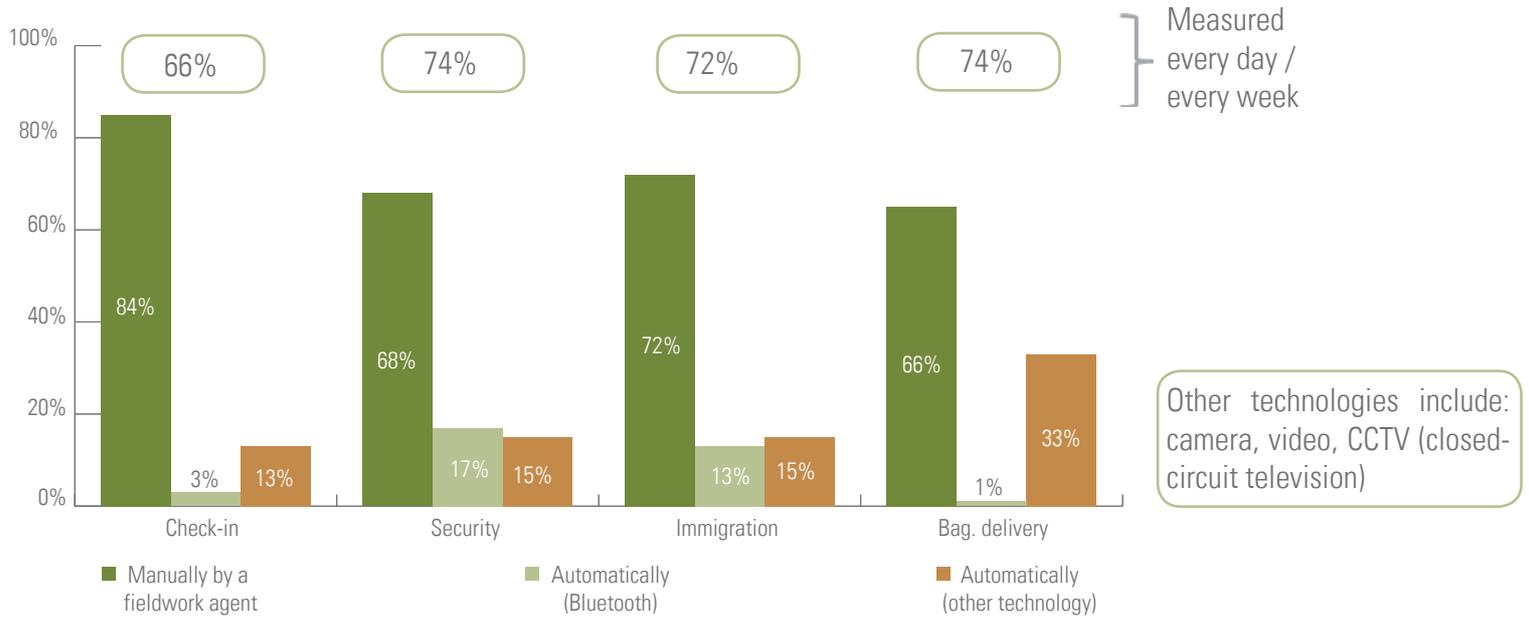
- 62%
- 77%
- 62%
- 71%

### Who is responsible for measuring waiting times?



Other includes: airport & service provider together

## How are the waiting time measurements done?



The majority of the airports that measure waiting times do so on a regular basis, that is every day or every week. In most cases, waiting times are measured manually by a fieldwork agent.

### Quantitative standards

Do airports that do waiting time measurements use them to define quantitative standards?

As seen in the last section of this report, 62% of the respondent airports measure their waiting times at check-in. Among these 62%, the majority (51%) have defined standards based on these measures. 59% of the ones that have defined standards have enforced them by a binding agreement such as a SLA.

69% of the participants that measure waiting times at security have defined quantitative standards, and of them 70% have enforced these standards by a binding agreement..

At immigration, 49% of the airports that measure their waiting times have defined standards, and these standards are enforced by a binding agreement in 51% of the cases.

Finally, 65% of the respondent airports that measure their waiting times at baggage delivery have used them to define quantitative standards, and of them 68% have enforced their standards by a binding agreement.

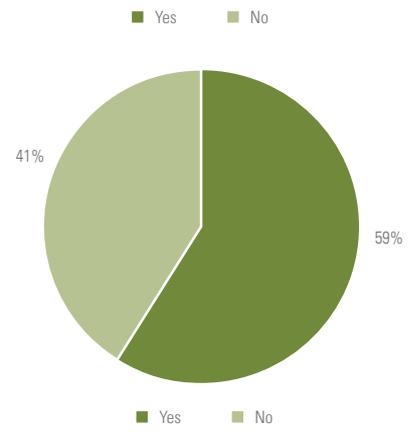
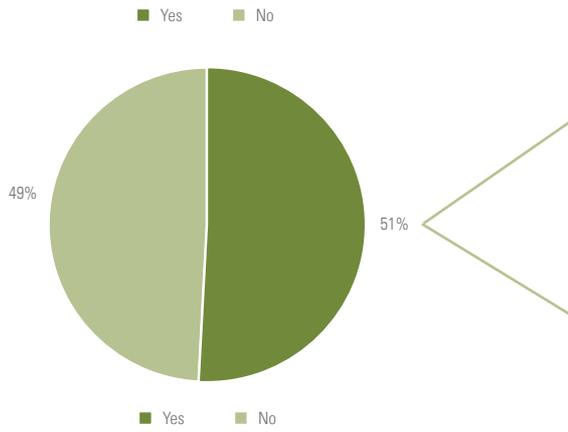
At each process, there is always one third to half of the respondent airports that do waiting time measurements without having defined any quantitative standards. Most of them are actually in the process of defining standards: they are measuring their waiting times in order to be able to define quantitative standards in the short-term.

## Have you defined standards?

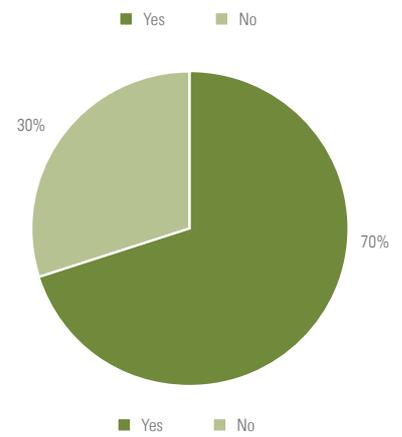
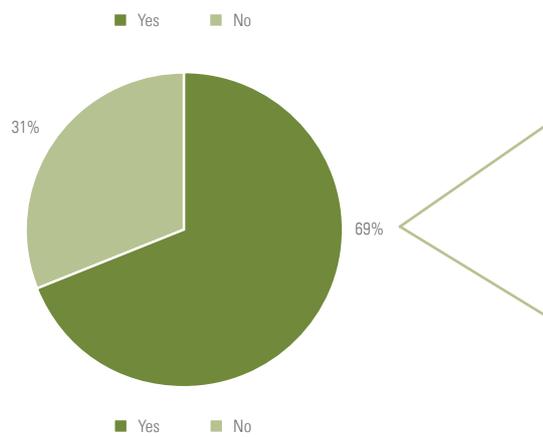
## Are these standards enforced by a binding agreement?

Waiting times measured

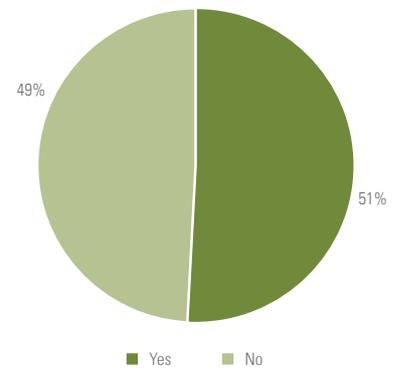
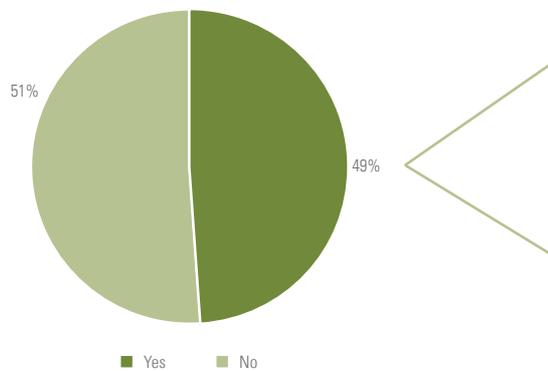
62%



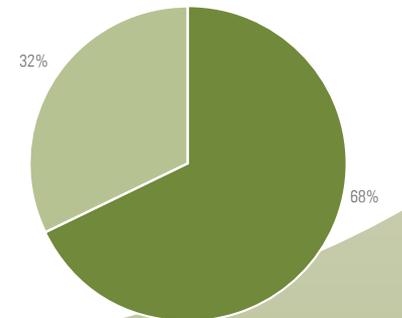
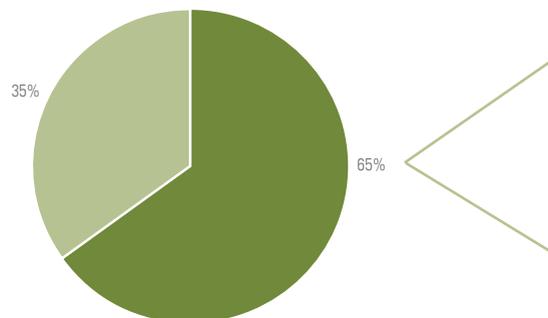
77%



62%



71%



To study the waiting time standards by region, we have grouped airports from Africa, Americas and Middle East under the "other regions" category as only a few airports from these regions answered the best practice survey.

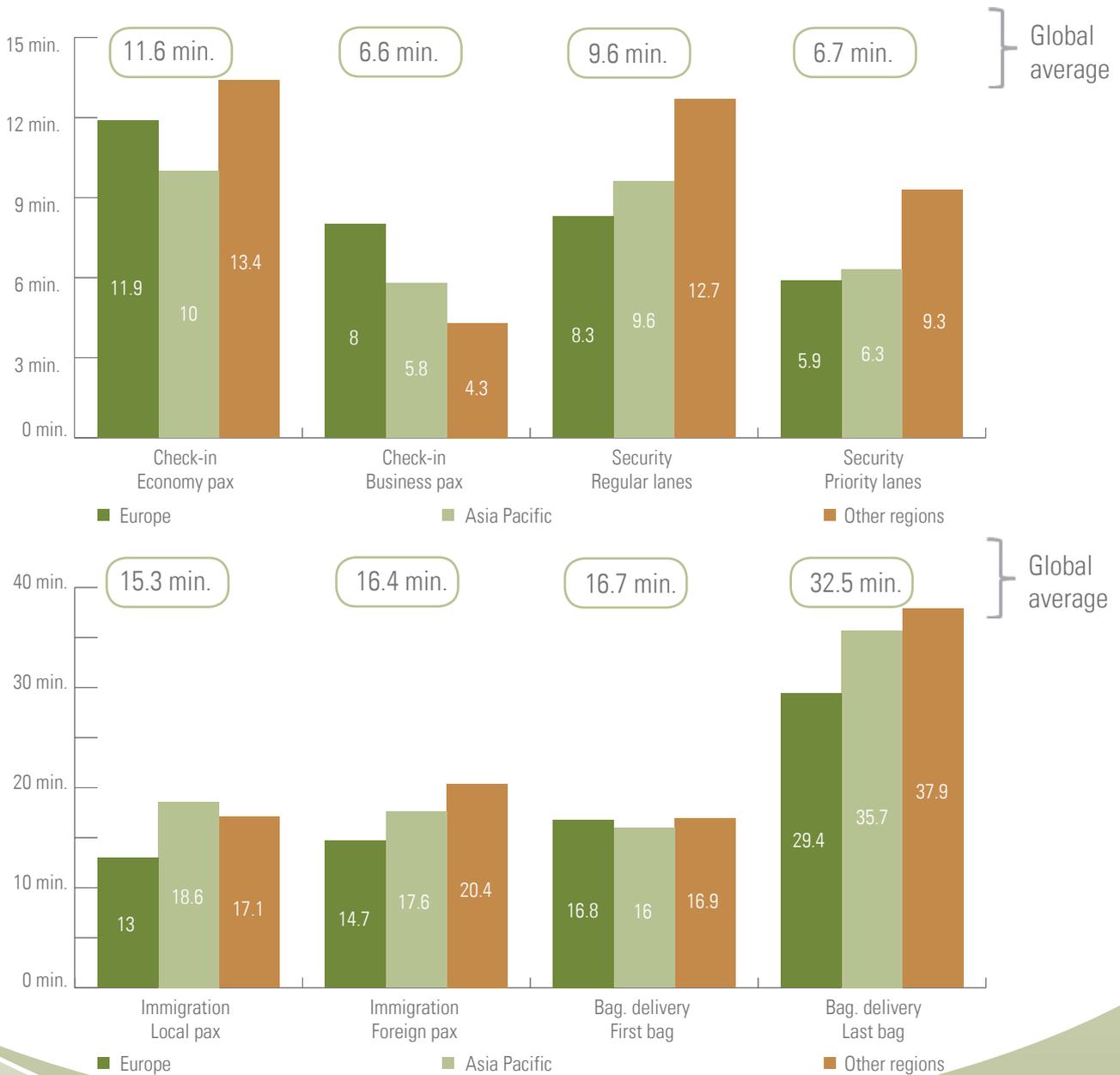
Economy passengers in Asia Pacific have the shortest check-in times. For passengers flying in business or first class, Africa / Americas / Middle East has the lowest waiting times at slightly more more than four minutes.

European airports have the lowest waiting times at security, for both regular and priority lanes.

Local and foreign passengers in Europe have the shortest waiting times at immigration.

Airports from Asia Pacific have the lowest waiting times for the first bag at baggage delivery, and for the last bag European airports have the shortest waiting times.

### Standard waiting times by region



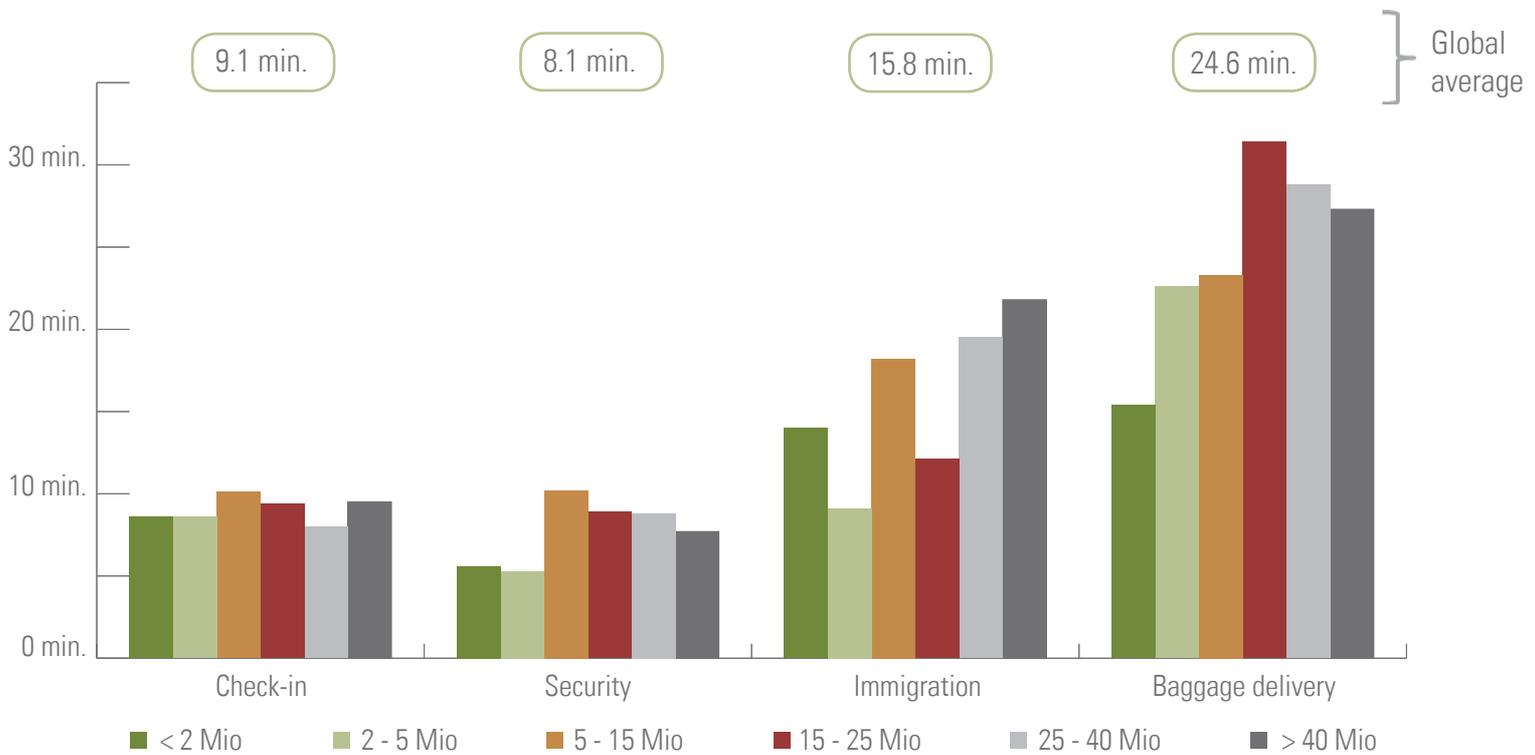
One would expect that the smaller the airport, the lower the waiting times and the quantitative standards. While this is broadly true, the correlation is not exact.

Interestingly, check-in standards seem to be independent of the airport size as they are similar for all size categories.

In addition to the airport size, two other factors impact the standards given for the different waiting times:

- **Financial resources:** bigger airports have more passengers travelling through their airport, but they also have more financial resources to be able to deal with crowded processes.
- **Standards definition:** at smaller airports, quantitative standards may be based on international standards, and not always on real capacity of the airport. This makes the standards sometimes higher than the real expected waiting times.

### Standard waiting times by airport size



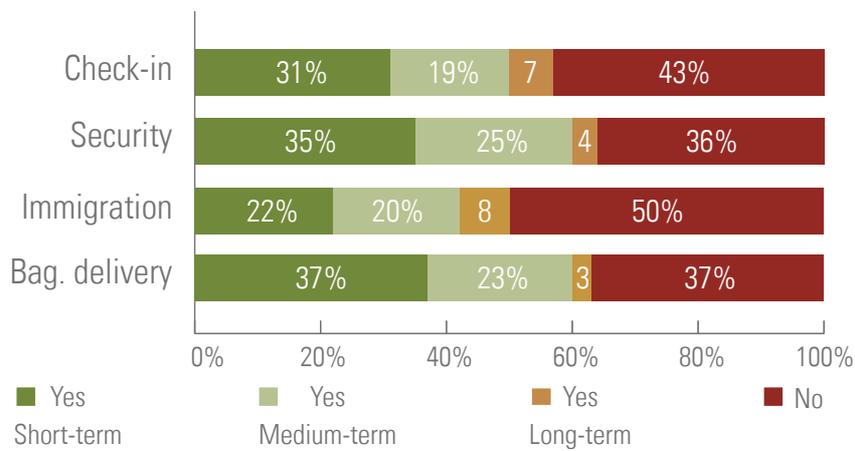
# Trends

Most of the participants in this survey plan to introduce more quantitative standards in the coming years.

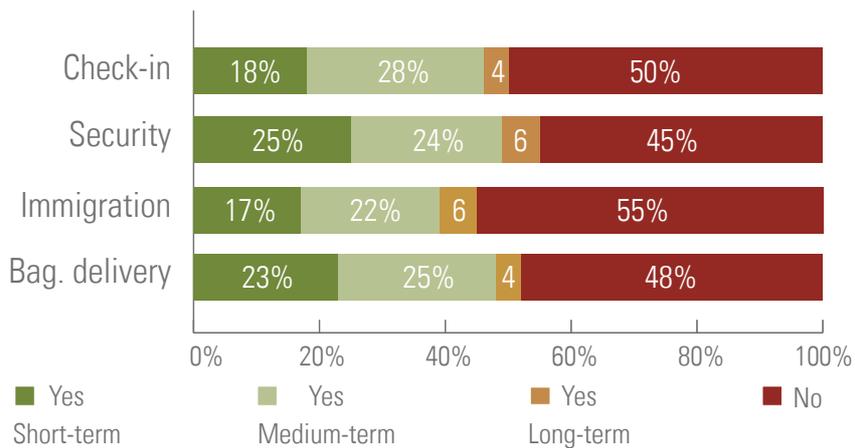
The majority of the respondent airports also plan to introduce more binding agreements to enforce their standards at security and baggage delivery.

For check-in, half of the participants do not plan to enforce their standards with more binding agreements and for immigration 55% do not plan to increase the number of binding agreements in place.

## Does your airport plan to introduce more standards?



## Does your airport plan to introduce more binding agreements?





## Contact Details



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