

Cleanliness Perceptions following Covid-19

July 2022

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InSites Consulting

Why did we conduct the research?

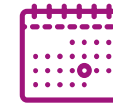
Need for research

Heathrow's wanted to understand the impact that Covid-19 has had on consumer perceptions of Cleanliness in their day to life and when travelling. Primary research needed to be conducted to evaluate what passengers expectations are towards cleanliness and whether perceptions (and therefore expectations) are higher than pre-pandemic levels.

As well as quantitative data this report offers strong verbatim responses to be able to articulate how passengers are currently feeling about the role cleanliness now plays in their day to day life and when travelling through airports following the period of heavy travel restrictions caused by Covid.



Methodology:
Survey on the
Horizon community



Research dates:
20th July – 25th July
2022



Audience:
424 passengers





Key Insights & Recommendations

Over half of passengers say daily life has returned – despite this fact, they are still taking precautionary measures, and these behaviours tend to increase when at the airport, resulting in high expectations of cleanliness.

Attentiveness to how clean areas and items are is the most common precautionary behaviour, both in everyday life and at the airport. Heathrow should respond accordingly by continuing to commit resources to keeping areas around the airport clean.



Prior to Covid, passenger expectations of airports was generally positive, with the worst of it being related to busyness and chaos caused by large crowds. Since Covid, passenger expectations of airports is that they are a generally disrupted environment caused by staff shortages, where Covid is also still a factor.

Despite the recent negative press about delays and disruptions, once clear of peak summer travel disruptions, cleanliness standards as dictated by lingering behaviours regarding Covid will remain a concern, and it will be key for Heathrow to continue their functions in this space.

Passengers feel that airport cleanliness is highly important. When asked to assess Heathrow's performance, they said the airport is doing better at cleanliness than it is at managing disruptions. Still, just over one in four passengers who have travelled since Covid say that airports are cleaner during their recent travel than before Covid – so there is a lot of room left for improvement.

The majority of passengers think that airports are the same amount of clean or less than before Covid – in the context of how much importance is passengers place on cleanliness, this is a strong indication that there is room for improvement. Heathrow should continue its commitment of resources to keeping the general airport spaces and bathrooms clean, seating areas free of rubbish, and ensuring plenty of hand sanitizer stations are available and functioning.



Expectations and behaviours



Six in ten passengers say daily life has returned – despite this fact, they are still taking precautionary measures

Current everyday behaviours specifically regarding Covid (T2B)

I pay more attention to how clean things are since the start of the Covid pandemic 68%

I have tried to avoid crowded spaces since Covid 62%

My day to day life has now returned to normal following Covid 59%

I'm a nervous flyer now, but was not a nervous flyer before Covid 16%

Significantly lower among UK residents than non-UK

“ All public places should be clean and free from the possibility of infection. The Pandemic has encouraged this attitude and the implementation of cleanliness. Public places should be regally cleaned with a good disinfectant. ”
45-54, Male, British, Oman

“ I don't expect things to always be clean, so I make sure and not touch things in public spaces. ”
35-44, Female, American, US

“ [Air travel now is] no different from prior to Covid. I 'expect' public places to be clean, as a matter of course! ”
45-54, Female, British, UK

26% disagree with this statement...

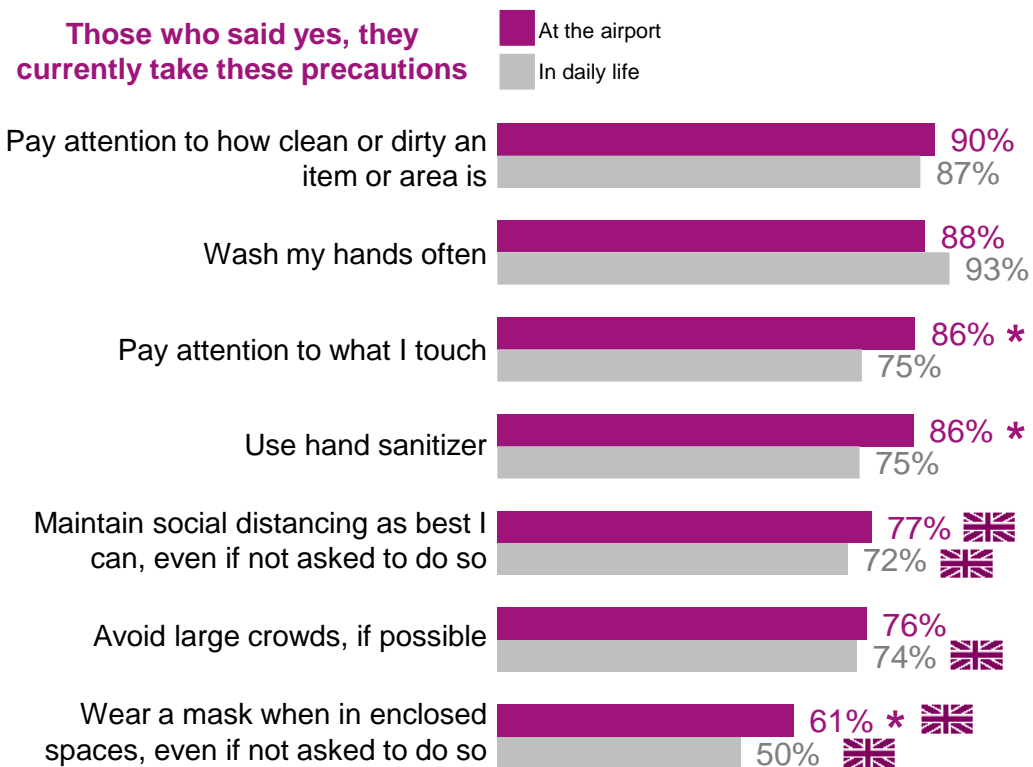
- These passengers are more likely (75%) to pay attention to how clean things are
- They are significantly more likely (85%) to avoid crowded spaces
- They are more likely (24%) to be nervous flyers now than before Covid
- **15%** neither agree nor disagree – they are still finding their bearings when it comes to the “new normal”

So What?

Expectations may have moved on a bit in light of lifted Covid restrictions, but that being said precautions are still being taken in everyday life.



Precautionary measures tend to increase when at the airport, resulting in high expectations of cleanliness there



Hand washing is the only thing done more often in daily life than in airports

- Hand washing is a generally widespread practice, even before Covid
- More opportunities to wash hands when not also managing the pressures of travel
- More opportunities to wash hands at home and at many places frequented in daily life

“ I expect airports to maintain enhanced cleaning procedures so as to minimise easy infection of passengers. ”

65-74, Female, British, UK

“ Constant cleaning [of the airport] throughout the areas - as one flight leaves or boards the gate area to be thoroughly cleaned. Toilets to be regularly cleaned. ”

65-74, Female, British, UK

“ I expect [the airport] to be maintained at a very high standard ensuring that surfaces people touch the most are deep cleaned on a regular basis and that sanitisers are still available throughout the airport. ”

45-54, Female, British, UK

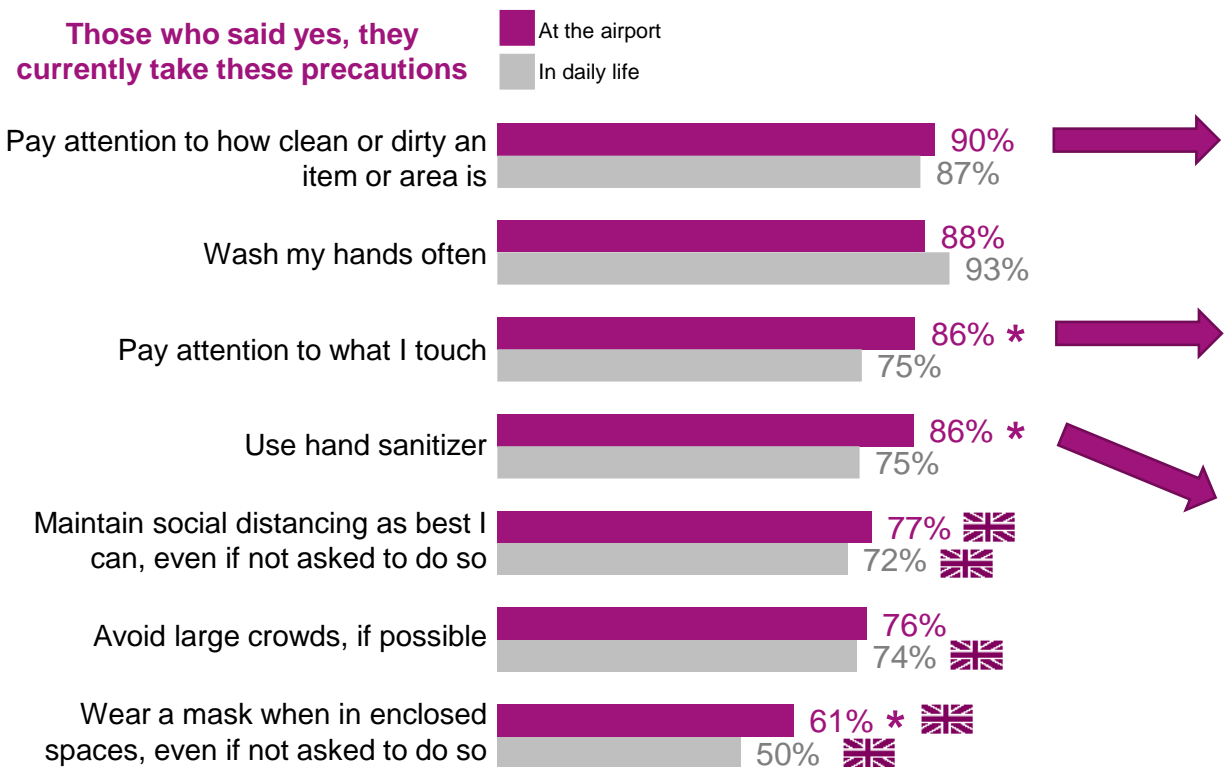
* At a total level, use of hand sanitizer, being attentive to what is touched, and voluntary masking are all significantly more common in airports than in everyday life

Significantly higher among UK residents than non-UK

So What?

Attentiveness to how clean areas and items are is the most common precautionary behaviour, both in everyday life and at the airport. This and other precautionary behaviours result in strong expectations from passengers that these public places – and even more so, airports – be kept clean.

Looking back at how passengers felt during the height of the pandemic, some of these attitudes still persist in the current moment



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Significantly higher among UK residents than non-UK

In February 2021, many passengers reported anecdotally that visible evidence of cleaning was a standout at making them feel safe and secure. Currently, passengers are still very attentive to cleanliness in the airport.
Historical data from Covid Travel Update (Feb '21)

In November 2020, 59% of passengers said they'd prefer touchless screen mirroring or "Covid clean certified" touchscreens at bag drop. Currently, passengers are still very attentive to what they touch in the airport.
 In November 2020, providing sanitizer was viewed as a minimum provision. The current figure shows that this is still very much the case.
Historical data from COVID Cleaning Trials (Nov '20)

So What?

Strong parallels exist between behaviours that significantly increase at airport in the current moment and those which were highly important during the peak of Covid. This suggests the measures taken by Heathrow to address these areas in the past – cleaning, offering hand sanitizer, and providing passengers with contactless solutions – are still a valuable way to help them feel safe and secure as they travel through the airport now.



Prior to Covid, passenger expectations of airports were generally positive, with the worst of it being related to busyness and crowding

Pre-Covid expectation of those who **have not** travelled since Covid:



Large crowds

- “Big and busy”
- Managing the chaos of everyone trying to get to their flights
- Not necessarily stress-free, but no anxiety over the size of the crowds themselves
- Maybe impacting baggage check, but little else



A generally positive experience

- Catching a plane means holidays or business trips – both of which have their perks
- An opportunity to shop at duty-free
- A generally efficient process
- Suitable level of staff to match demand



I would expect check-in to be quick, passport control and security to have minimal queues, and plenty of cafes and restaurants airside. Flight to embark passengers and leave on time.

55-64, Male, British, UK



Fewer disruptions

- Less delays and cancellations, very rarely at short notice
- Lots of available flights
- Smoother journeys



“Simpler times” – back when the worst part about airports was...

- Both airfare and in-airport prices felt expensive
- Long walks between train station and the airport, long walks between check-in and gate



[I expect] quick check in or online check in (bag drop if necessary) and efficient security process, then easy walk through to shopping prior to airline lounge access. Well signed directions to gate, plenty of seating and space at gate then smooth transition into aircraft. I expected the airport to be clean with good ventilation and not cluttered with queues or bags. Plenty of toilets and water stations. Also well staffed with professional helpful staff and effective security.

55-64, Male, British, UK



So What?

Those who have travelled since Covid look back at the pre-Covid period from a perspective of comparison – the worst thing back then was chaos caused by crowds and long walks, and expectations of delays and cancellations were low.



Since Covid, passenger expectations of airports is that they are a generally disrupted environment where Covid is also still a factor

Post-Covid expectation of those who **have not** travelled since Covid:



More red tape

- Vaccine requirements
- Border complications having left the EU



Airport is not Covid safe

- Minority of passengers still refusing to return to air travel (e.g. “my expectations are so much worse that it is a deterrent to using any airport”)
- Expecting to feel very anxious when at the airport



Media-driven awareness of disruptions

- Mass staff shortages, especially at security
- “Baggage everywhere”
- Queues out the door



I imagine that the whole process will take longer, be more time consuming and frustrating. The news footage of recent airports have not helped this view.

45-54, Female, British, UK



Post-Covid expectation of those who **have** travelled since Covid:



Personal experience with heavy disruptions

- “Horrendous” queues
- Having to arrive several hours early
- Danger of missing your flight
- Flights cancelled
- Have a backup plan
- Don’t check baggage to save time / avoid queue
- No lost bags
- More staff



As it’s been hard to find new staff to meet the increasing demand, my current expectations are a lot more waiting. Hopefully, this will improve over time. I also have had a number of flights cancelled.

55-64, Male, British, UK



That the airport help with Covid protection

- Widespread expectation that there is more focus on airport cleanliness than before Covid
- Availability of sanitising stations
- Expect there to be areas where passengers don’t have to sit so close one another
- May also expect to be checked for vaccination

So What?

Despite the recent negative press about delays and disruptions, once clear of peak summer travel (and the associated disruptions this has been causing), cleanliness standards as dictated by lingering behaviours regarding Covid remain as a main concern. It will be key for Heathrow to continue their functions in this space.





Airport cleanliness performance

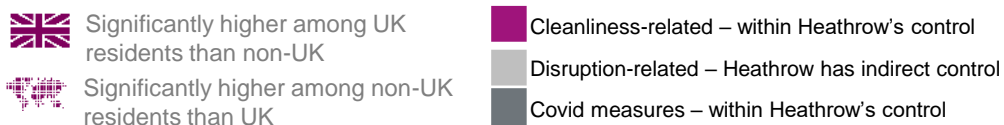
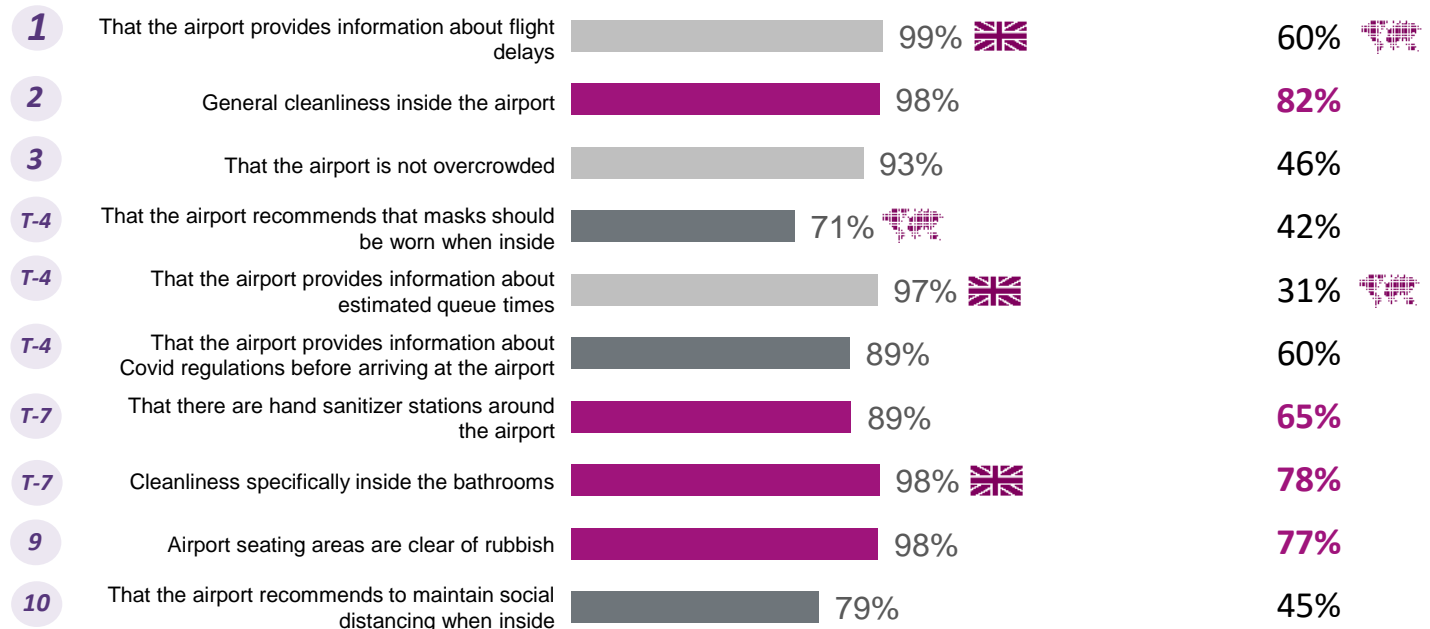


At a total level, airport cleanliness is highly important – and Heathrow is performing better in this area than it is at managing disruptions

Ranked as **most important thing**

Q. How important are each of the following if you were to travel through an airport in the near future?

% of **recent Heathrow passengers** who say the airport did a good job at this



“ Particular attention to high-throughput areas, especially bathrooms and eating spaces. ”
65-74, Male, British, UK

“ Good cleanliness sends a signal that all health is taken seriously. ”
55-64, Male, British, UK

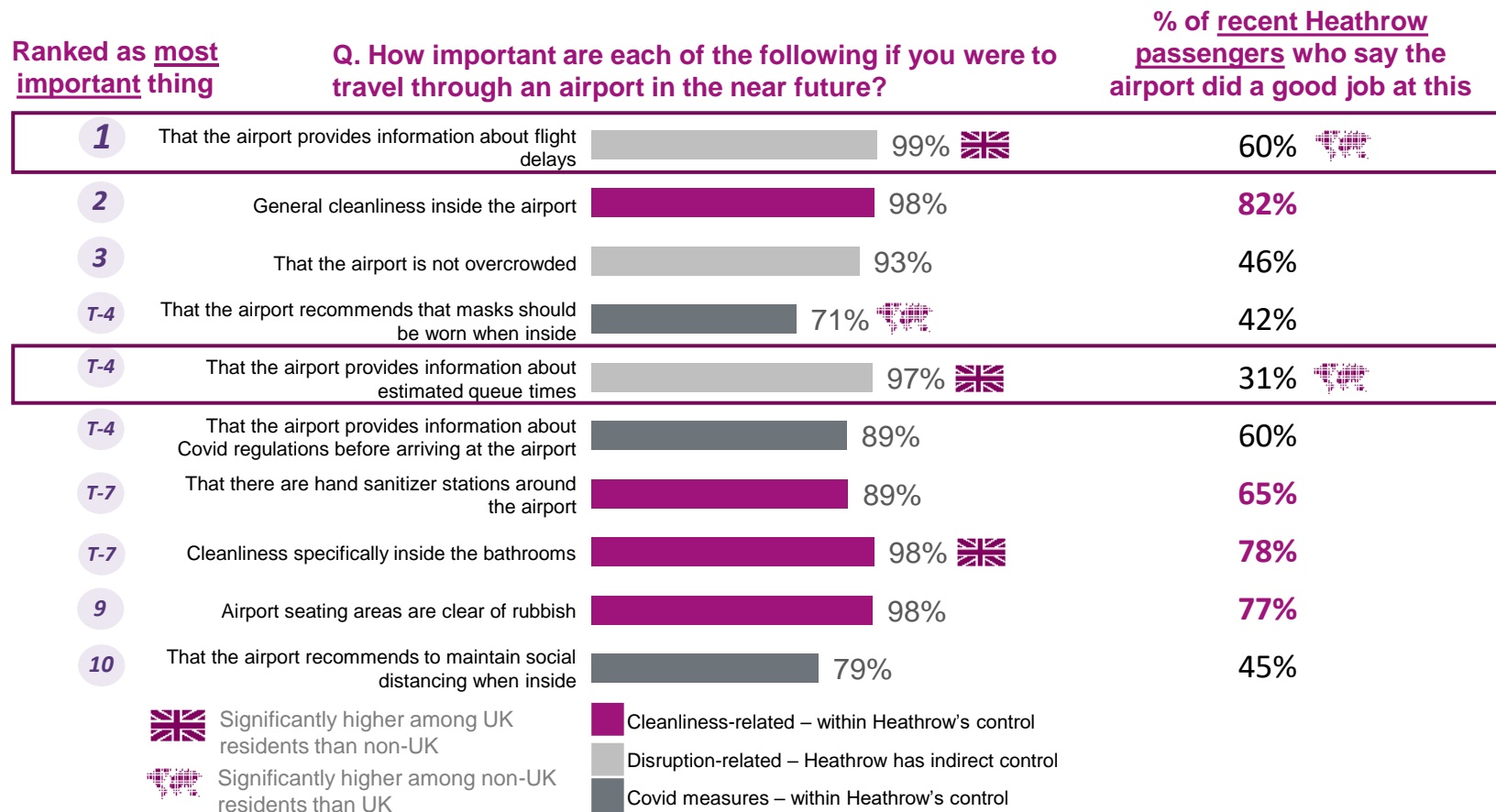
“ I think the overall expectation of airport cleanliness is very high, and airport disinfection must be carried out comprehensively to be effective. ”
55-64, Male, Chinese, France

So What?

General cleanliness is viewed as important as information about flight delays, which is one of the main symptoms of the recent disruptions. The difference between the two is a) Heathrow has direct control over cleanliness, and b) Heathrow is performing better in this area than with disruption. This level of performance and the fact that Heathrow has more direct control – combined with the importance passengers place on cleanliness – shows that a continued investment in cleanliness is key.



Comparing UK residents vs non, disruption-related items are significantly more important while Heathrow is performing significantly lower



From reports on TV with all the suitcases being left around in heaps and queues miles long waiting for check in and security, something needs to be done quickly or else lots of these airports etc will eventually close as people are so fed up with everything going on at the moment. I am not too concerned re Covid, I just want my airport experience to be hassle free.

25-34, Male, Romanian, UK



So What?

Though disruptions are impacting the aviation industry beyond the UK, it seems to be particularly top of mind among passengers who live in the UK. Moreover, they believe Heathrow to be doing a poorer job in these areas than non-residents, so Heathrow should stay on top of comms to reassure passengers and provide them the information they need.



Just over one in four passengers who have travelled since Covid say that airports are cleaner during their recent travel than before Covid

Specifically among recent Heathrow passengers, **28%** say the airport was cleaner than before Covid, **61%** say it was about as clean as before Covid, and **10%** say it was less clean



Where is Heathrow “falling down” when it comes to airport cleanliness?

- Sanitizer stations running out / not working
- Restaurants seem dirtier than before Covid, e.g. collection of used glasses was not regular enough
- Overflowing bins and rubbish on the floor and around seating areas



You now see less cleaners cleaning, and more rubbish (cups etc) on seats or under them on the floor.

35-44, Male, British, UK



Honestly, it just wasn't as clean - the airport was crowded and clearly understaffed. It lacked sufficient rubbish receptacle and cleaning plans.

35-44, Male, British, UK



The amount of people passing through [the airport] obviously brought more rubbish, which was not able to be cleaned by the reduced cleaning crews

35-44, Male, American, US



So What?

The majority of passengers think that airports are the same amount of clean or less than before Covid – in the context of how much importance is passengers place on cleanliness, this is a strong indication that there is room for improvement.



17% of passengers identify as immunocompromised, or regularly travel with someone who does – for this group, cleanliness is key

When it comes to current behaviours specifically regarding Covid, compared to total level (T2B) this group is...

- Significantly more likely to use hand sanitizer in both daily life (93%) and at the airport (97%)
- Significantly more likely to pay attention to what they touch at the airport (94%)
- Significantly more likely to pay attention to how clean/dirty an item/area is in both daily life (96%) and at the airport (99%)
- Significantly more likely to avoid crowds when possible in both daily life (89%) and at the airport (90%)
- Significantly less likely (43%) to say their daily life has returned to normal
- Significantly more likely (33%) to be nervous flyers now than before Covid

The 16% who regularly book passenger assistance also report higher levels of Covid precautions in their daily lives. Compared to total level (T2B) this group is...

- Significantly more likely to use hand sanitizer in both daily life (90%)
- Significantly more likely to pay attention to what they touch both in daily life (93%) and at the airport (96%)
- Significantly more likely (33%) to be nervous flyers now than before Covid

Interestingly, this group is equally as likely (59%) to say their daily life has returned to normal – perhaps for them, precautionary behaviour is a more standard part of their everyday life



Afraid that the standards applied at height of pandemic are being degraded faster than is safe.

65-74, Male, British, UK




Most of the public places which I go to are clean, and I expect them to remain so. I don't go there otherwise.

65-74, Female, British, UK




The overall expectation is that airports will pick up the pace on cleaning.

25-34, Male, Chinese, UK



So What?

Expectations may have moved on a bit in light of lifted Covid restrictions, but for those in more vulnerable groups, this is not the feeling. For these passengers, significant precautions are still being taken in everyday life, and cleanliness at the airport is key.





Moving forward

Attentiveness to how clean areas and items are is passengers' most common precautionary behaviour, both in everyday life and at the airport. Heathrow should respond accordingly by continuing to commit resources to keeping areas around the airport clean.

Despite the recent negative press about delays and disruptions, once clear of peak summer travel disruptions, cleanliness standards as dictated by lingering behaviours regarding Covid will remain a concern, and it will be key for Heathrow to continue their functions in this space.

The majority of passengers think that airports are the same amount of clean or less than before Covid, and in the context of how much importance passengers place on cleanliness, this is a strong indication that there is room for improvement. Heathrow should work to commit resources and staff to try and move the needle and make progress in their post-Covid cleanliness levels.





THANK YOU - HERE'S A BIT MORE INFORMATION ABOUT YOUR COMMUNITY

About Horizon

The community is a hub on which our members – both users of Heathrow and potential users come to talk all things airports, both with us and their peers. We run a range of research topics with members including surveys, discussions, vox pop recordings, and offline workshops.



Any questions?

Do not hesitate to contact the project team...

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