THE EXPERIENCE OF THE OLDER LEISURE TRAVELLER AT AN AIRPORT: THE CASE OF FRANKFURT AIRPORT

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ABSTRACT

This thesis is about the experience of older people who travel through an airport. The research reported took place at the interface of population ageing, tourism travel and airport management. Although air transport is influenced by population ageing, older people's experiences within this specific environment are largely untold. This is surprising, as flying is the preferred form of travel for much of international tourism and airports represent key infrastructure for the provision of dependable services. Thus, there are gaps in knowledge on older travellers at an airport and the airport's role in this part of leisure travel. In particular, a holistic examination of older travellers' experiences within the airport environment is missing.

This research uses different approaches to the experience concept to explore the expectations, needs and demands of older travellers. It investigates the airport experience of older travellers, in light of the changing roles of airports in society. In the form of a qualitative single-case study, it examines the situation of the older leisure traveller at Frankfurt Airport in Germany. Data was collected through 66 interviews with older leisure travellers, frontline employees and managers, complemented by 50 observations. This provides a comprehensive perspective of the older travellers' airport experience and represents a novel approach.

The thesis makes several contributions to experience, travel and tourism literature. On the demand side, the findings allow for a better understanding of the experience of the older passengers. The effect of ageing on an airport's customer base is investigated. It is discussed whether this group needs special treatment within the regular passenger process. On the supply side, the emerging role of the airport as part of the overall holiday journey is explored. Furthermore, the findings show how airport management deals with this particular passenger group.

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1. INTRODUCTION

1.1 Overview of the Research

This thesis is about the experience of older people who travel through an airport as part of their holidays. The rationale for the research is manifold.

Demographic trends are profoundly affecting Western societies. Population ageing impacts all aspects of life. It creates widespread social and economic opportunities as well as challenges. One challenge will be 'to satisfy the needs of older persons while enabling them to have longer, healthier and more productive lives' (United Nations, Department of Economic and Social Affairs, Population Division, 2013, p.75). Although older people should be a focus of critical tourism enquiry (Cohen and Cohen, 2012, p.2186), cross-disciplinary research stories that deal with older travellers' tourism experiences in later life are largely untold (Sedgley, Pritchard and Morgan, 2011, pp.423-425). Their experiences within specific environments in tourism travel are under-researched. While changing sociodemographics influence the development of tourism and holidaymaking (Williams, Stewart and Larsen, 2012, p.5), little research exists that examines changes in the tourism and air travel market due to population ageing.

A growing body of literature (Go and Moutinho, 2005, p.317; Major and McLeay, 2013, p.5; Patterson and Pegg, 2009, pp.268-269) shows that older people are taking on an increasingly active role in society. Mobility, as an expression of their quality of life, gains in importance for them. They enjoy travelling and participate in tourism activities as part of their active lifestyles. Most public and academic discussions portray older people as richer and fitter than previous generations. Marketing literature, in particular, is eager to identify business opportunities because of their purchasing power and consumption patterns. While expectations of holidays tend to change as people get older (Peattie and Moutinho, 2005,

p.19), little insight into the characteristics of these changes in their travel behaviour exists.

Preliminary engagement with the topic showed that air transport generally does not gain great attention within tourism studies (Weiler, Moyle and McLennan, 2012). This is of importance, as flying is the preferred form of travel for much of international tourism (Forsyth, 2008, p.74). In particular, an airport's role in this part of leisure travel is under-researched. This is surprising, as airports represent key infrastructure and have to provide dependable services. Despite a growing number of older travellers who get on an airplane to travel to their holiday destinations, very little is known about the effects of population ageing on airports.

While population ageing poses challenges to tourism travel, it also creates business opportunities, and these are of interest to airport management. The days are gone when airports supplied only a public transport infrastructure. The airport has developed from an 'airport city' into an 'aerotropolis' (Kasarda, 2008) and a hub of mobility that allows people to travel. As a result of deregulation, privatisation and commercialisation, the challenges for airports are manifold. They have to turn into modern service providers. At many airports worldwide, the commercial paradigm dictates most of their activities. This is a development that is not without criticism, because the interests of the airport users may be overlooked in this transformation (Halpern and Graham, 2013, p.28).

Airports often position themselves as modern service providers in these transformation processes, to gain competitive advantage. However, while airports are asked to meet shifting expectations in their customer base, it does not appear that they compete on service for their older clientele. The passenger process that is available to all passengers at the airport is clearly defined and standardised, and there is little room for service differentiation. On the surface, passenger processes appear to

work well at airports around the world; it seems that there is neither the need nor the desire to question their effectiveness for all customer groups, nor the need for major overhauls. Will older travellers look for specifically designed processes to ease their journey through the airport? While passenger processes at present appear to meet expectations, cost pressure in the air transport industry leads to constant efforts to optimise them. Personal service and one-on-one human interaction is becoming less common. This move towards self-service technologies appears to stand in contrast to older people's wish for friendly service interactions (Ganesan-Lim, Russel-Bennett and Dagger, 2008). As a result, it seems that airports are not too keen to cater for the special needs of older people. The question is, should airports provide a more tailored airport experience for older passengers, in light of their increased number?

Early engagement with the concept of customer experience (Pine and Gilmore, 1998) revealed that service industries do indeed compete on the concept's terms (Johnston and Kong, 2011). Discussion about the concept of 'service' has turned towards the appropriateness of experiences within specific environments. While previous research has concentrated on various aspects of service delivery at airports, a holistic description of travellers' expectations, needs and demands is missing (Fodness and Murray, 2007, p.493). The situation at the airport for a specific customer group has not yet been investigated.

The present research uses Sykes and Desai's (2009) model of passenger airport experience to explore the experience of older travellers within the airport environment. Three research questions guided the research:

- What is the airport passenger experience of older leisure travellers?

- Do older passengers need special treatment in an airport?

- How is airport management responding to older passengers?

To explore these three research questions, the work relies upon data obtained from interviews and observations. The research focus is upon the older leisure traveller. In this thesis, he or she is also referred to as 'older passenger'. 'Old' and 'older' is as those who are 60 years of age or over (i.e. the 'over-60s'). This definition is in line with the United Nations' (2013, p.3) classification of 'old'.

1.2 Methodological Approach

The methods used to explore the research questions are described in Chapter 3. This section presents an outline of the methodological approach that was applied.

The thesis' main objective is to enhance understanding of older people in the context of one part of their leisure travel, i.e. the airport. It discusses a phenomenon that was noticed in practice (Van Maanen, 1988, p.9). To learn about people's perceptions, feelings and thoughts that account for their airport experience, a method was needed that allows for a comprehensive understanding of the research questions in a practice-oriented and problem-focused manner (Kelemen and Rumens, 2008, p.158). A single case study evolved as the most suitable method, as it adds to this needed extensive and complex understanding (Yin, 2009). Case study research is popular in tourism studies. In particular, it is often used for investigations of the tourism value chain (Song, Liu and Chen, 2013). This work defines the service experience at the airport as part of that tourism value chain.

The case study research took place at Frankfurt Airport in Germany. Material collected through secondary sources complemented the empirical findings in the form of interviews and observations. A total of 66 interviews were conducted with management, frontline employees and older leisure travellers. Fifty non-participatory observations took place to complement the interview data. With this approach to data collection, the

research relied upon multiple sources of information (Creswell, 2007, p.73). Thematic analysis then provided the necessary depth of insight into the collected data. Its coding process followed Saldaña's (2013, p.58) recommendation to progress in two cycles.

1.3 Gaps in Research

The investigation of the older leisure traveller at an airport represents a new approach. The overriding aim of the research is to produce combined knowledge that blends 'theoretical and practical perspectives into a synthesis' (Starkey and Tiratsoo, 2007, p.146). The work's intended contribution can be summarised in three main fields.

First, it contributes to the literature by opening up a possible exchange of ideas between different academic fields. Literature at the interface not only of tourism and airport management (Graham, Papatheodorou and Forsyth, 2008, p.1) but also of those two with population ageing is scarce. In tourism studies, the older traveller is increasingly in the focus of attention. However, most research takes place in the holiday destination and not at the journey's point of origin or arrival (Benckendorff and Zehrer, 2013). In air transport literature, the changing role of airports gets some attention. Often deregulation, privatisation and commercialisation as well as specific aspects of operational performance are investigated. Apart from some retail and operational investigations, few studies (Fodness and Murray, 2007), however, have looked in detail at the airport from a tourism research perspective. Duval (2013, p.505) even comments that a 'detailed interrogation of the tourism - aviation relationship is arguably still in its infancy within academic scholarship'.

Second, the research aims to enhance understanding of older leisure travellers who journey through an airport. Existing research shows that people are keen on having new experiences (Major and McLeay, 2013, p.5). Indeed, they 'become more […] adventurous and demanding'

(Graham et al., 2008, p.1). They appear to be ‘wealthier, healthier and more experienced travellers than before’ (Graham, 2008, p.28). The research examines whether these descriptions hold true for passengers who pass through Frankfurt Airport. For that examination, it explores the concept of the service experience (Pine and Gilmore, 1998) and applies it to the airport context. The focus is upon the passenger experience, which Kirk (2013, p.174) defines as ‘a complex interaction of necessary and voluntary activities’. Popovic, Kraal and Kirk (2009, p.2) point out that there is a gap in qualitative research that addresses these components of the passenger experience at an airport. This research investigates whether current commercial and non-commercial offerings fulfil older passengers’ expectations and whether their needs and demands are met. An adequate passenger service can make their travel through an airport easier, for instance by better supporting people with limited mobility. Thus, the present work aims to contribute to an improvement in the situation of older people (Huff, Tranfield and Van Aken, 2006).

Third, the research encourages dialogue between academia and practice. Management research is often criticised for lacking in relevance for practice; while the literature is influenced by practice, ‘little influence flows from academics to industry’ (Pfeffer and Fong, 2002, p.86). This work tries to bridge this gap for tourism and airport transport researchers and management. It aims to produce knowledge that is useful and relevant for both (Starkey and Tiratsoo, 2007, p.146; Tranfield and Starkey, 1998, pp.341-353; Van Aken, 2004, p.225). It provides a starting point for a discussion on how airports deal with demographic change within their customer base. This is because, while traveller profiles have greatly evolved (Brilha, 2008, p.168), little research has looked specifically at the effect of ageing on an airport’s customer base.

The research findings can help airport management to design a passenger experience that meets the requirements of older travellers. At the same time, the findings provide some ideas on how management can ensure future competitiveness if they decide to compete on service. The

findings identify possible business opportunities and challenges that demographic change can bring.

1.4 Thesis Structure

This section describes the structure of the thesis. It gives an overview of the individual chapters.

Chapter 2 - Literature Review: The second chapter starts with a look at population ageing. It draws a picture of the older passenger who passes through an airport. The relationship between air transport and tourism is investigated, with an emphasis on the research topic. Then the literature review describes the concepts of the service experience (Pine and Gilmore, 1998) and the evolution of experiences (Neuhofer and Buhalis, 2014), as they serve as frameworks for the investigation. While Lally and Fynes (2006) offer a practical approach from a tourism management perspective to the study of service experiences, Sykes and Desai (2009) provide a model for understanding the airport passenger experience. The discussion then turns to the role airports play in today's society. Deregulation, privatisation and commercialisation have redefined their roles since the late 1970s (Starkie, 2002). The review looks at how airports compete and what role service plays in this respect. The chapter concludes with the identification of the three research questions that this work investigates.

Chapter 3 - Research Design and Methodology: A qualitative research design - inductive in nature - evolved as the most suitable approach. A single-case approach provided specific answers to 'how' and 'why' questions and afforded an extensive and detailed understanding of the experience (Yin, 2009). The chapter describes how data was collected from interviews with management, frontline employees and older leisure travellers. Observations served to complement the interview data.

Thematic analysis and a two-cycle coding process are described before the chapter concludes with the limitations of the chosen methods.

Chapter 4 - The Case Context: The fourth chapter explores the case setting: the airport environment. It serves to introduce the reader to issues that face a major international airport and its passengers and that are relevant to the research focus. Some background information on the specific setting of the research - Frankfurt Airport (FRA) - is offered. The current passenger process, with its special service offerings, is elaborated upon as it shapes the experience of the traveller on the ground. Then, a closer look is taken at the airport operator, Fraport AG Frankfurt Airport Services Worldwide, its history and its organisation.

The main purpose of the fifth chapter and the following one is to present the findings from the interviews and observations. This discussion reflects on the key aspects that were raised in the literature review and the examination of the case context. They are structured in line with the research questions.

Chapter 5 - Discussion of the Results on the Demand Side: The fifth chapter starts with a description of the older traveller by frontline employees, managers and the travellers themselves. It shows how older leisure travellers want to be addressed when they journey through the airport. Research findings are used to delineate the treatment of the older leisure traveller within the standard passenger process. This is followed by the role personal service plays for them. Then, findings are looked at that illustrate their satisfaction with the airport's passenger services. This is followed by a separate discussion of the services that are in place for passengers travelling with reduced mobility. Finally, the effect of increased automatisation on the older travellers' airport experience is described.

Chapter 6 - Discussion of the Results on the Supply Side: The sixth chapter discusses how airport management responds to older travellers.

It elaborates upon the empirical results that capture management's awareness of and reaction to older passengers. It examines the effect of population ageing on their strategies and operations. The emerging role of an airport is discussed, with an emphasis upon its competitiveness and its relationship with the airlines.

Chapter 7 - Conclusions and Implications: The final chapter provides a summary of the work. The contributions of relevance to the literature, to older passengers and to management are outlined. Limitations of the research are offered, followed by suggestions for future research.

2. LITERATURE REVIEW

2.1 Introduction

This chapter examines the literature on tourism and air travel and leads to the formulation of the work's research questions.

Population ageing results from decreasing mortality rates and declining fertility rates. This demographic change has major social and economic consequences (United Nations, 2013, pp.xii-xiii). Population ageing affects tourist flows. The United Nations World Tourism Organization (2014) states that international tourism hit a new record at the end of 2014, with over 1.1 billion international tourists travelling the world in one year. Tourism activities, as an expression of mobility, play an increasingly important role in societies. Much of the demand for air travel relates to tourism (Papatheodorou and Lei, 2006, p.47).

The Travel and Tourism Research Association identifies 'shifting sociodemographics' as one of five top management research priorities (Williams et al., 2012, p.5). On a similar note, Cohen and Cohen (2012, p.2186) raise the question of shifting demographics and their impact on tourism and travel. They call for more critical research on older people in tourism to address this under-researched subject. More research with a combined focus on tourism and ageing is wanted. Sedgley et al. (2011, p.425) stress that more qualitative research on the travel experience of older people is needed:

> [R]esearch stories relating older people's emotional encounters through travel, the role it plays in their lives and its impact on their physical and emotional well-being remain largely untold […]. Instead of investigating the full breadth of older people's travel experiences and encounters, tourism researchers have overly focused on market intelligence-style studies in order to provide marketing recommendations to the tourism industry.

Sedgley et al. (2011) advocate the investigation of specific elements in tourism and ageing. They ask researchers to 'apply cross-disciplinary enquiry, engage older people in the research process and look for more personalized accounts of tourism experiences in later life' (Sedgley et al., 2011, p.423). The present research aims to contribute to answering this call for qualitative research on older people's travel experiences.

The objective of this literature review is to gain a better, more holistic understanding of the tourism service element within the airport environment. It is structured as follows: It starts with a summary of population ageing. Section 2.3 then draws a picture of the older traveller who passes through airports, followed by a description of the relationship between air travel and tourism in Section 2.4. The service experience (Pine and Gilmore, 1998) is introduced as a conceptual framework for the planned investigation. The evolution of service experiences (Neuhofer and Buhalis, 2014) is explained, followed by a brief investigation of the concept's different components. A model by Sykes and Desai (2009) is presented that helps to describe the airport passenger experience.

In Section 2.5 the chapter then examines literature that describes the actual service experience at the airport. This service encounter is explained in terms of the provision of adequate infrastructure and passenger services. The themes that help to explain this service encounter within the focus of this research are elaborated upon (i.e. mobility-reduced travel, service quality, personal service and the rise in automatisation).

The discussion then turns in Section 2.6 to the role airports play in today's society. Deregulation, privatisation and commercialisation have redefined the role of airports since the late 1970s (Starkie, 2002). These developments are described to provide a better understanding on how airports compete for airlines and passengers. Their strategies are investigated to see what they do to turn into service providers. The chapter concludes with the formulation of the work's research questions.

2.2 Population Ageing Worldwide

The United Nations' Population Division prepares national, regional and global estimates and projections of older populations, monitors levels and trends in population ageing and collects and analyses information on the relationship between population ageing and development. It reports on the situation of older people and their well-being through supportive environments and infrastructure. The Population Division's major findings, that are central to the focus of this work, are:

> Population ageing takes place in almost all countries in the world as a direct result of decreasing mortality and declining fertility rates […]. The number of older people (aged 60 and over) is expected to more than double, from 841 million in 2013 to two billion in 2050. […] Ageing has major social and economic consequences (United Nations, Department of Economic and Social Affairs, Population Division, 2013, pp. xi-xiii).

In its reporting, the Population Division differentiates between people who are 60 years and older and those who are 80 years and older. In line with this definition, this work looks at people who are 60 years and older and classifies them as old or older. This is a simplification as population ageing can mostly be characterised by its diversity. The World Health Organization (2015a, p.3) states that 'there is no "typical" older person'. While some older people experience 'significant declines in physical and mental capacities', others are as physically and mentally fit as much younger ones.

Table 2.1 shows the development of the absolute numbers and the distribution of people who are 60 years and older by the world regions between 2015 and 2030.

Table 2-1 Number and Distribution of Persons Aged 60 Years or Over by Region, 2015 and 2030

	Persons Aged 60 Years or Over in 2015 (millions)	Persons Aged 60 Years or Over in 2030 (millions)	Percentage Change Between 2015 and 2030	Distribution Of Older Persons in 2015 (percentage)	Distribution Of Older Persons in 2030 (percentage)
World	900.9	1402.4	55.7	100.0	100.0
Africa	64.4	105.4	63.5	7.2	7.5
Asia	508.0	844.5	66.3	56.4	60.2
Europe	176.5	217.2	23.1	19.6	15.5
Northern America	74.6	104.8	40.5	8.3	7.5
Latin America and the Caribbean	70.9	121.0	70.6	7.9	8.6
Oceania	6.5	9.6	47.4	0.7	0.7

(United Nations, Department of Economic and Social Affairs, Population Division, 2015b, p.2)

Europe is expected to see a substantial growth in absolute numbers of people who are 60 years and older (23.1 per cent).

Table 2.2 illustrates population ageing at a national level. Countries worldwide are ranked according to the percentage of their populations who are 60 years and older.

Table 2-2 Country Ranking by Percentage of Population Aged 60 Years or Over in 2013

Rank	Country	Percentage of Population Aged 60 or Over
1.	Japan	32.0
2.	Italy	26.9
3.	Germany	26.8
6.	Greece	25.4
7.	Sweden	25.2
9.	Portugal	24.5
13.	France	23.8
22.	United Kingdom	22.9
39.	United States of America	19.5
44.	Russian Federation	18.8
67.	China	13.8
79.	Brazil	11.0
105.	India	8.2

(United Nations, Department of Economic and Social Affairs, Population Division, 2013, pp.94-95)

2.3 Who is the Older Traveller?

Market segmentation has become increasingly important for an understanding of travel behaviour. All attempts to find a definition of the older traveller, however, question whether a common denominator can be identified. It is mostly their diversity that characterises them. Older travellers' behaviours vary widely as ageing can take different forms.

While it is acknowledged that the market is highly heterogeneous, age is one of the most common differentiators (Patterson, 2006, p.28). This is despite that '[p]eople generally age at different rates, and do not always

look or act their age' (Patterson and Pegg, 2009, p.264). Brilha (2008, p.168) describes the characteristics of this diverse group.

> Modern airports have an extended customer base, which makes huge demands on airport management […]. However, [the] air travel industry and tourist profiles have greatly evolved, reflecting disposable income, added experience from travel frequency, vast information and social and cultural changes in society.

Thus, the wide spectrum (e.g. with respect to wealth, health, interests) of traveller profiles needs to be taken into consideration. Older people can find themselves in different economic situations; their holiday behaviours and health conditions are diverse. Consumer marketing research shows that older consumers are far from being a homogenous group (Giereth, 2006; Greco, 1988; Hirschel, 2010; Leventhal, 1990). Their expectations and demands vary (Kohlbacher, Gudorf and Herstatt, 2010, p.28). While critical voices from a variety of disciplines warn against stereotyping, marketing tries to segment the group. Segmentation by age only, however, is regarded as too simplistic.

> [T]he senior travel market is also one of the most challenging for scholars to understand due to its inherent complexities. First, this segment is not easily identifiable. […] Second, more so today than ever before, ageing has become a largely non-uniform process (Tung and Brent Ritchie, 2011, p.332).

The diversity of the group is shown by Kohlbacher and Hang (2007). They point out that some older people need easy-to-operate products or support and care devices while others look for luxury goods. Older people are increasingly interested in consuming the same services as other age groups. They conclude that older people prefer an inclusive, 'age-neutral' approach instead of customised offerings (Kohlbacher and Hang, 2007, p.18). In other words, older people do not want to be singled out. Segmentation based upon age or, worse, discrimination is not wanted.

2.3.1 Travelling in Old Age

Leisure travel is among the most popular activities among older people. Go and Moutinho (2005, p.317) summarise this phenomenon from a marketing perspective.

> As a result of the increase in life expectancy, a larger share of travellers will consist of older people who are healthy enough, have a secure income, and fewer family responsibilities. Though population growth in Europe is close to zero and the propensity for travel already high, the demand for travel can be anticipated to increase as a function of an ageing population.

Patterson and Pegg (2009, pp.268-269) observe that the more active and adventurous older traveller is attracting increased attention as 'a larger part of the leisure market'. This growing demand for holidaymaking is associated with the concepts of self-actualisation and self-realisation, as tourism researchers Prebensen, Larsen and Abelsen (2003, p.416) show. Older people are interested 'in enriching their lives through the gaining of knowledge rather than being entertained so as to satisfy their needs for self-expression, creativity, and internal growth' (Patterson and Pegg, 2009, pp.268-269). Older travellers are progressively more in search of 'fun, entertainment, enjoyment, and active participation' (Major and McLeay, 2013, p.5). The ability to break away from daily routines and to experience something new is a measure of quality of life for many people (Graburn, 1983, p.29; Oh, Fiore and Jeoung, 2007, p.121). The market potential of older people for holiday travel is evident in the fact that ageing populations in developed countries

> increasingly have the time and the resources to travel, creating a growing market for 'grey' or 'mature' travellers. Many of these consumers have a dependable pension income, no large mortgage commitments and considerable amounts of leisure time. Travel expenditure is an important element of the modern older consumer

> lifestyle, and as a market they are relatively discerning and interested in value for money (Peattie and Moutinho, 2005, p.19).

In particular, as one of the fastest growing segments, older people like to travel in a group. Holiday tour operators such as Saga Holidays, Thomas Cook and TUI increasingly cater for this customer segment. They invest in market research on older customers and design holiday packages accordingly. TourVital is a subsidiary of Thomas Cook that serves active older travellers. It offers 'travel experiences to exotic destinations' (TourVital, 2014) within the safety of group travel at a premium price. Mediplus offers its customers medical assistance throughout their holidays. Doctors accompany their groups worldwide. Mediplus arranges for bus pickups at their customers' homes, their busses at the destinations offer greater comfort and porters are available to help with the luggage. The leisure market of the future is not a mass market but a niche market that needs to be differentiated according to customer group and their unique wishes and demands (Mediplus, 2014).

2.3.2 The Active Senior Tribe

Henley Centre Headlight Vision (2007) provides a scenario report on how demographic, geographic and political trends might shape 'future traveller tribes'. A tribe, in this context, refers to a group of people who share a specific traveller behaviour. Besides 'global clans', 'cosmopolitan commuters' and 'global executives', 'active seniors' are being identified as such a tribe. Social, demographic and economic developments show that these 'tribes' will shape the profiles of the travellers who pass through airports. The 'active senior tribe' is described as older travellers who have a number of specific travel needs. They are characterised not only by their economic situation but also by their age-related physical needs. The report investigates their particular needs throughout their journey, from booking, to check-in, in-flight to baggage collection (Henley Centre Headlight Vision 2007, pp.2-21). It concludes with the observation that future travellers 'demand higher levels of control, comfort, security and

personalisation from the travel experience. With ageing societies worldwide there will be unprecedented numbers of older people travelling' (Henley Centre Headlight Vision, 2007, p.21).

2.3.3 The Role of the Leisure Traveller

In the context of this research, a leisure traveller is a passenger who boards an aircraft as part of his or her holiday journey. Travelling for other personal reasons, family visits or emergency travel do not fall into that definition of leisure travel.

With 43 per cent of international tourist movements by air, in all regions of the world, excluding Europe, air travel is the most popular mode for leisure travellers. In Europe, due to shorter distances, travel by car also plays an important role (Button, 2004, pp.16-17). With a wide range of possible travel and tourism experiences available to them, older leisure travellers will increasingly engage in the design of their unique holiday experiences (King, 2002, p.107). As one form of customer engagement in these holiday experiences, the construct of value co-creation of travel services has attracted increased interest in the marketing literature in recent years (Grissemann and Stokburger-Sauer, 2012). Value co-creation means that the consumer creates value individually or socially by engaging in the service process (Grönroos and Voima, 2013, p.144).

This integration of the older passenger as a co-creator of value is in line with Prebensen's (2014, p.34) comment that social interaction throughout the journey makes 'their trip valuable and worthwhile'. According to her, the traveller wants to be part of the overall experience. In another study, entitled 'Coping and Co-creating in Tourist Experiences', Prebensen explores how tourists create experiences in various situations during a vacation (Prebensen and Foss, 2011). The study does not look specifically into the transport part of the holiday. However, it cites the airport check-in situation as one example where consumer participation exists. According to Prebensen and Foss' findings, passengers become

actors who participate in co-creating value through interaction at this service contact point. The passengers engage in the creation of the experience on the ground (Prebensen and Foss, 2011, p.55).

This view of the leisure traveller as consumer and co-creator allows this research to concentrate on the key concepts of service provision and service experience. From a services management stance, the task of the airport in that respect would be to enable and develop experiences that suit their customers' needs and demands. The airport is part of the service industry and becomes a facilitator of value for the passenger.

2.4 Air Travel and Tourism

This work considers the airport as a part of the whole leisure travel service experience, i.e. the holiday journey. Air travel is regarded as an intermediate service; it serves as an in-between of a traveller's origin and destination (O'Connor, 1989, p.79). People get on an airplane to achieve another purpose, i.e. they wish to go on a holiday. Whereas the airport's original task was simply to enable people to travel from A to B, they now do much more. The airport is not only an infrastructure but also a service provider. An airport is 'a tourist terminal facility' as a leading tourism scholar puts it (Page, 2011, p.116). Services at the airport contribute to the overall travel and tourism experience and enable people to travel for leisure purposes. Demand for air travel is largely derived from tourism activities (Graham, 2006, p.14). These tourism activities are on the rise worldwide (Cohen and Cohen, 2012, p.2178; Tretheway and Mak, 2006).

The International Civil Aviation Organization (2014), a United Nations Specialised Agency, describes the development of worldwide air travel from a service to a few to a means of mass transportation.

> The world airlines carried a total of approximately 200 million passengers in 1963, expanding to 3.1 billion passengers in 2013, reflecting an increase of more than 15 fold over five decades [...]. Air

> travel provides fast and affordable air service to millions of tourists with destinations around the world. Currently, more than 50 per cent of international tourists are transported by air.

The International Air Transport Association (IATA) is the trade association that represents most of the world's airlines. IATA expects to see a 31 per cent increase in air passenger numbers between 2012 and 2017. By 2017, total annual passenger numbers are forecast to rise to 3.91 billion. This is 930 million passengers more than in 2012 (International Air Transport Association, 2013). Air travel and tourism are considered growth industries and benefit from multidisciplinary cross-fertilisation, as shown by Duval (2013). His work concentrates on the economic regulation of commercial air travel, climate policies and the relationship between tourism destinations and the airlines' business models. Duval (2013, pp.494-495) believes that not enough academic research has specifically addressed intertwined themes such as global tourist flows and the wider aero-political environment. This is a gap that the present research was designed to reduce.

Similar to Duval's (2013) observation on cross-fertilisation, Forsyth (2007, p.3) shows that air travel and tourism are interconnected. He states that the benefits reaped from tourism are sometimes the main drivers for policy decisions in aviation. For example, new airline routes generate traffic to new holiday destinations, while an increased interest in particular destinations on the part of leisure travellers creates demand for new air services.

As a result of this interconnectivity, 'transport for tourism constitutes a "service", which is increasingly judged by consumers and providers in relation to the quality, standards and level of satisfaction it engenders' (Page, 1994, p.6).

Low-cost airlines play a significant role in the development of new air services. Graham's (2013, p.75) conclusion that the exact relationship

between low cost airlines and ‘economic development (including tourism) and the role the airport plays is not at all certain’, shows that the impact of route development on tourism and vice versa is under-researched.

2.4.1 The Service Experience in Tourism

The following sections explain the conceptual framework for the work. According to tourism management researchers Otto and Ritchie (1996), tourism can be regarded as a service industry or an amalgam of service industries. They observe that ‘to translate the consumer experience into managerial action, research into the experience of tourism from a services marketing perspective is warranted’ (Otto and Ritchie, 1996, p.165).

Sandström et al. (2008), with a background in service management, provide a definition of the experience concept that serves as a starting point for the discussion in this chapter. Sandström et al. (2008, p.118) state that a ‘service experience is the sum total of the functional and emotional outcome dimensions of any kind of service’. The experience is always unique. With that definition, the older leisure traveller becomes a co-creator of value in the passenger process at an airport in order to enhance his or her overall holiday experience (Helkkula, Kelleher and Pihlström, 2012).

The concept of the service experience has gained in significance in theory and practice in management ever since Pine and Gilmore introduced it in 1998. They hold the view that developed nations move from a service-oriented to an experience-based economy (the so-called service experience economy). According to them, economic growth opportunities for organisations lie in the value of the experiences they provide. The service provision alone does not suffice anymore, as services are commodities; they are homogenous and purchased because of price and availability. Experiences, in contrast, can be regarded as distinct economic offerings, separate from services and

goods. ‘An experience occurs when a company intentionally uses services as the stage, and goods as props, to engage individual customers in a way that creates a memorable event’ (Pine and Gilmore, 1998, pp.97-98).

This statement shows that a service experience is a combination of what is offered and how it is offered. People consume services not for functional reasons but for the memorable events that surround them. As a result, organisations - such as airports - can use the creation of experiences for their customers as a differentiator to enhance their own competitiveness. In the case of an airport, this implies offering a passenger service experience that is uniquely different from the offering at other airports. It creates value beyond the functional value of getting people onto an airplane.

Work by Carù and Cova (2003), however, criticises the notion of experience to understand consumer behaviour. According to them, the approach lacks a solid foundation and is defined only in ideological terms. Carù and Cova (2003, pp.267-282) argue that not every experience has to be extraordinary or memorable. This is a point that needs to be investigated further in order to determine whether airports have to offer an extraordinary experience tailored to older travellers or whether the existing, standard airport product suffices.

Research on customer experience in specific environments is thin (Verhoef, Reinartz and Krafft, 2010). Interestingly, most research on the service experience has been done from the perspective of the organisation. More insight from a customer-based perspective would be desirable (Tynan, McKechnie and Hartley, 2014). In the field of tourism research, the construct of ‘an experience’ seems to have been of greatest interest in destination marketing, which has examined what the tourist experience of visiting the holiday destination actually looks like. However, experience in that regard is considered as context rather than as content. It is something that is taken for granted - ‘a by-product’ - rather than

created or staged (Stamboulis and Skayannis, 2003, p.39). Oh et al. (2007, p.129) comment accordingly that the concept of the experience economy has been addressed in tourism literature only at an introductory conceptual level. Little is known about how tourists actually 'seek, enjoy and evaluate their vacation experiences' (Morgan et al., 2009, p.208).

Recent research, however, shows that the concept of experience has become more important for the tourism industry. Stickdorn (2014, pp.329-344), with a background in strategic management and service design, for example, comments that 'the experience' is turning into a central success factor for tourism products within the whole service ecosystem.

2.4.2 The Evolution of Experiences

According to tourism scholars Neuhofer and Buhalis (2014, p.124) the experience concept has evolved from Experience 1.0 (The Experience Economy) to Experience 2.0 (Co-Creation Experiences) and is presently moving towards Experience 3.0 (Technology Enhanced Tourism Experiences).

Table 2.3 sets out the characteristics of these three different stages.

Table 2-3 Comparison Evolution of Experiences

Experience 1.0	Experience 2.0	Experience 3.0
•Passive provision •Physical staging •Experience on-site •Company staging •Standardized, mass produced experience •One-way delivery (company to consumer) •Innovation by transforming services into experiences	•Active co-creation •Physical co-creation •Experience on-site •Company engaging and co-creating •Customized co-creation experience •Two-way engagement (company and consumer) •Innovation by transforming experiences into co-creation experiences	•Holistic technology enhanced co-creation •Physical and virtual co-creation •Extended experience in the pre-travel, on-site and post-travel stage •Company co-creating and technology-enhancing •Rich, personalized, connected, co-constructed experience •Multi-level engagement (company, consumer and surrounding connected network of providers, co-consumers, and social networks) •Innovation by transforming co-creation experiences into rich technology-enhanced experiences

(Neuhofer and Buhalis, 2014, p.131)

Table 2.3 suggests that the airport product progresses through these three distinctive phases. Is the airport part of the service experience economy? In its role as an infrastructure provider, the airport finds itself in the first phase, Experience 1.0. Passenger services are delivered in the form of a standardised product. It is a ‘passive provision’ and the airport is ‘staging’ it. However, the airport’s role is evolving towards

increased service provision, and in many regards Experience 2.0. That is, with its commercial and non-commercial service offerings, the airport tries to engage the customer in value 'co-creation'. This is confirmed by Popovic et al.'s (2009, p.2) view that 'passengers are active participants in their interaction with the airline'. They also point that that this sort of interaction 'can both help and hinder airline processes'.

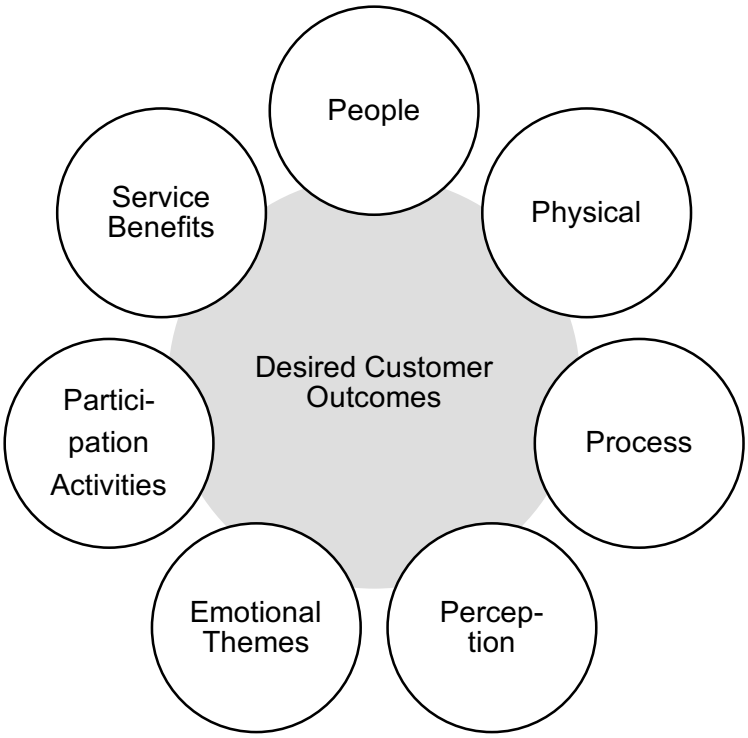
It remains to be seen whether the airport progresses to the third stage, Experience 3.0. Does it develop its passenger services offering into experiences or are the customer service points strictly of functional value? It has to be examined to what degree the older leisure traveller is engaged in the passenger service provision. In particular, the introduction of self-service technologies needs to be looked at in greater detail to find out how much they impact the evolution of the airport experience.

2.4.3 The Components of the Experience Concept

A model by Lally and Fynes (2006) offers an approach to understand the service experience within tourism travel. Their intention is to contribute to management knowledge of experience design and to the enhancement of the tourism experience.

The model (Figure 2.1) suggests that 'people', 'physical', 'process' and 'perception' components, together with 'service benefits', 'participation activities' and 'emotional themes', all account for the experience.

Figure 2-1 Conceptual Model of Experience Concept Components



(Lally and Fynes, 2006, p.13)

Although this model is intended for tourism practitioners in the Irish tourism industry, parallels with the airport experience can be drawn. To satisfy core needs, 'service benefits' have to be made available to customers. In the case of the airport, this is the provision of the airport product. Consistent with the ideas of the service experience economy, this experience not only provides the essential service benefits but also 'unique emotional and participative elements'. The 'people' component in the model stands for frontline employees who deliver passenger services and 'contribute to social interactions and facilitate participative activities'. The 'physical' component stands for buildings and facilities, i.e. the airport infrastructure. The 'process' component enables the delivery of the service benefits. Passengers participate in the process and value is created jointly. 'Perception' is how passengers perceive the outcomes of the service experience. According to Lally and Fynes (2006), the management of expectations is important in that regard. 'Emotional

themes' articulate 'the emotional outcomes the experience seeks to satisfy', while 'participation activities' aim to 'design opportunities for active customer participation which allow for the creation of inherently individual experiences for each customer' (Lally and Fynes, 2006, pp.14-21).

Thus, Lally and Fynes' (2006) model on the experience concept components provides a starting point for examining the actual service encounter at the airport. It serves to analyse how the different contact points of the passenger services are congruent with concepts in the literature on experience. While this model has a background in (destination) tourism marketing, the next section offers an approach that looks at the airport passenger experience in more detail.

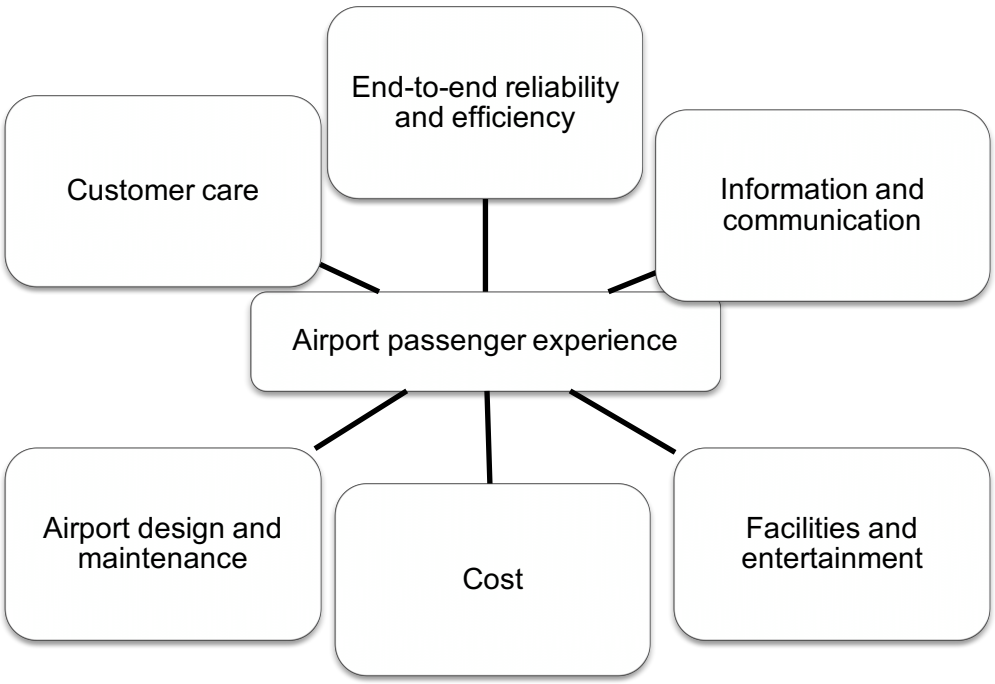
2.4.4 The Airport Passenger Experience

This approach is provided by social researchers Sykes and Desai (2009). They offer a key model for investigating the commercial and non-commercial service offerings that make up the passenger process at an airport. The present research uses it for understanding the airport passenger experience in greater depth. Sykes and Desai's (2009) model is the result of a report commissioned by the Department for Transport in the United Kingdom. Its objective is to explore the airport experience of different passenger groups in order to 'understand the key factors that affected airport experience in terms of the end-to-end journey; compare experiences across passenger types; and highlight passengers' priorities for improvement' (Sykes and Desai, 2009, p.5). The report's findings give a fuller understanding of the situation at British airports. Besides examining environmental impacts and proposing future infrastructural investments, the report aims to provide guidance on how to improve the passenger experience.

Using focus groups and interviews, the report provides an insightful summary of passengers' attitudes, experiences and preferences when

they make their travel decision for or against an airport. According to Sykes and Desai (2009), the passenger's choice is dependent upon 'the availability and cost of flights', 'the proximity and/or ease of access' and the 'preference for a particular airport'. The last aspect was closely connected with the 'perceived quality of service, familiarity and reliability' of that airport (Sykes and Desai, 2009, p.1). The findings reveal that passengers look mostly for an efficient and trouble-free journey through the airport and in the journeys to and from the airport (Sykes and Desai, 2009, p.43). The report sorts the issues addressed by the passengers into six themes that influence the quality of the passenger experience (in order of importance): 'end-to-end reliability and efficiency', 'information and communication', 'customer care', 'facilities and entertainment', 'airport design and maintenance' and 'cost' (Sykes and Desai, 2009, pp.1-3). These are depicted in Figure 2.2.

Figure 2-2 Key Themes Affecting the Airport Passenger Experience



(Sykes and Desai, 2009, p.13)

Across the six key themes, it is important to provide passenger services that allow for personal control and ensure fair treatment. The significance of these key factors, however, varied for different passenger groups. The authors acknowledge that further explorations are needed to differentiate the findings by certain groups of travellers, for example by business and non-business travellers, families with young children and people with disabilities (Sykes and Desai, 2009, p.40). However, no differentiation based upon age was undertaken within their study. The group of the older passengers is not examined in greater depth. This indicates the need for more research. The present research investigates how older travellers value these themes as part of their overall journey. As a result, it allows for more comprehensive descriptions of the airport passenger experience of the older traveller.

2.5 Passenger Services at an Airport

The focus of this work is upon the airport experience. In the following, a closer look is taken at an airport's passenger services, i.e. the service offering and its features that contribute to the creation of this experience. Passenger services are part of an airport's product. An airport's product consists of the core product (enabling the passenger to get on and off an aircraft), the tangible product features (e.g. check-in, baggage handling, security, customs, immigration and ground transport) and the augmented product (lounges, loyalty schemes, commercial and conference facilities, transfer services and hotels) (Halpern and Graham, 2013, p.119). It is mainly in the hands of the airport operator to design the airport product in such a manner that it meets the requirements of all stakeholders.

Within the passenger process, the experience at such service points as check-in, baggage, passport control, security, food, retail, gate, boarding, immigration, customs, way finding and information is crucial (Fattah et al., 2009, p.9). Page (2005, p.282) found the following points to be important to passengers on their way to the aircraft:

> Speed of check-in, efficiency of passport control, customs clearance and security screening, luggage retrieval, availability of shops, duty-free goods and associated services, and a spacious and relaxed environment in which to wait prior to boarding the aircraft.

Similar to Page's (2005) definition they show that the airport product consists of commercial and non-commercial passenger services that shape the overall airport experience. Popovic et al.'s (2009, p.2) work points out that there is a gap in qualitative research that addresses the components of the flight and non-flight services at the airport:

> This is a significant shortcoming as, in addition to the essential flight related tasks of navigating the terminal in order to check in and board their flight, passengers make many decisions about how to spend their time on non-flight related services provided at the terminal.

Interestingly, while the provision of these components of the airport product is mostly in the hands of the airport operator, research by Bergadaà (2009) shows from a marketing perspective that it is primarily the airlines - not the airports - that maintain the actual relationship with the passenger. Passengers expect the airlines to look after their needs in the terminal. Bergadaà (2009) explains that by means of the flight ticket, the passenger's contractual relationship is with the airline and not with the airport (operator).

2.5.1 Mobility-Reduced Travelling

With the focus on the older traveller, the description of the airport product is not complete without mentioning the processes that are in place for people who are disabled and, as a result thereof, reduced in their mobility. Older travellers account for this group in a high proportion as reports by the World Health Organization (2011; 2015) show. An estimated 20 per cent of people who are 70 years or older, and 50 per cent of people who are 85 years or older, are mobility disabled.

Disabilities gradually increase as people get older, however, they accelerate after people turn 70 and 'cause a growing need for help especially after the age of 80 years' (Heikkinen, 2003, p.6).

Few researchers have addressed older people's situation in the context of air travel. Poria, Reichel and Brandt (2010, p.218) point out that little tourism management research on flight experiences exists on the expectations of those passengers who qualify for special services because of their disabilities. How these special services work in practice is described in Chapter 4.

Air travel researchers Chang and Chen (2011, p.1214) state that airports increasingly pay attention to providing services for mobility-reduced passengers, '[b]ecause social equality is recognized as a worthwhile objective'. Their research investigates impaired passengers and does not differentiate by age. Their observation that airport authorities should consider offering more value-added services (such as having more wheelchairs throughout the terminal buildings) to enhance that group's mobility is an interesting one. It implies that airport authorities proactively provide free services for passengers with reduced mobility.

In another study, Chang and Chen (2012, pp.535-536) show that mobility-reduced passengers complain most about the distance between the car park and airport terminal. Barrier-free lifts and barrier-free ramps are requested. In their conclusion, they call for more research on air passengers with physical impairments worldwide to validate their findings. Chang and Chen's (2012) study draws from statistical data for an airline in Taiwan.

2.5.2 What Do Passengers Expect?

What do passengers expect from their airport experience? That the level of analysis of the service encounter within the airport context varies becomes apparent with consideration of the following three approaches.

Firstly, Amadeus (2011), a leading IT system provider for the air travel and tourism industries, suggests that to appeal to older passengers, both airlines and airports need to react to changing demands by offering services that are tailored to the needs and demands of older travellers. Seventy-two per cent of passengers surveyed cite inefficiencies in the core passenger journey, from check-in to boarding, as the main area for complaints. Speed, simplicity, convenience and reliability are identified as the core processes that are central to the passengers' emotional well-being. The atmosphere in the terminal, vision, sound and smell also are identified as important aspects for satisfaction (Amadeus, 2011, pp.12-20).

Secondly, a survey entitled 'What do passengers really want?' (Future Travel Experience, 2011, p.1) concludes that the aspect that most improves the passenger experience on the ground is high-quality signage, communications and staff. Future Travel Experience is an industry website that claims to concentrate on the entire travel process from the passenger's point of view.

Thirdly, according to Stickdorn (2014, p.331), the sum of process and discretionary activities account for the expectations a traveller has of a tourism product. For an understanding of these expectations, it is necessary to analyse the contact points separately. They encompass a wide variety of different direct and indirect interactions and need to be evaluated in terms of customer impact and performance before they can be turned into points of superiority within the overall experience (Athanassopoulos and Iliakopoulos, 2003).

2.5.3 Service Quality

Regardless of the different expectations, central to the airport experience is the level of service quality. The task of an airport is to produce services of a high quality to meet the needs of passengers (Janic, 2003, p.240). Strategic management scholars Hamel and Prahalad (1994, p.57)

described the state of this service encounter as '[a] downward spiral of customer expectations, where ever poorer service begets ever lower expectations and ever more price sensitivity'. How is service quality in the passenger process perceived today? Service quality is often measured in terms of how expectations are met. It consists of the measurable objective level of service quality received and the subjective perceived quality. There is a range of approaches to measure service quality and passenger satisfaction (e.g. Chen and Chang, 2005; Pakdil and Aydin, 2007; Sultan and Simpson, 2000).

Anderson, Pearo and Widener (2008) investigate the service concept and customer characteristics from a management perspective. With data from the US airline industry, they examine the impact of core (operational) service attributes and peripheral (service interaction, facility) components against customer characteristics like age. Differences in passenger characteristics are linked to differences in what passengers value and appreciate. What matters to passengers 'differs significantly across customers with different demographic (e.g. gender, age) and situational characteristics (e.g. class of service)' (Anderson et al., 2008, p.366). Their research does not go into greater detail about the relationship between the airport service concept and customer characteristics. However, age is identified as having an effect on the level of satisfaction with the quality of the service received. Nonetheless, what constitutes a satisfactory or good passenger service offering is subjective and dependent upon many variables. No clear understanding exists of the degree to which older passengers, for example, are satisfied with the service quality they encounter at the airport.

Tourism researchers Fodness and Murray (2007) provide a key research paper on passengers' expectations of airport service quality. They elaborate upon traditional service performance measures but add the criticism that an all-encompassing, widely accepted model of the dimensionality of passenger' expectations in terms of service quality perceptions is missing. Fodness and Murray's (2007, p.493) call for more

research into passenger expectations regarding service quality perceptions ‘in this understudied service category’.

With a background in services marketing, Ganesan-Lim et al. (2008) prove that service quality perceptions are affected by passenger age. Their study investigates whether service quality varies according to the type and level of service contact received and whether these perceptions of quality in turn vary with demographic variables such as age, gender and income. While no difference in service quality perceptions was found with regard to gender and income, customer age was shown to affect perceptions. According to Ganesan-Lim et al. (2008, p.558) older customers put more importance on service staff attitude and appreciate courteous and friendly service interactions. They call to pay attention to ‘mature individuals in relatively mundane service encounters’. Notably, the perceptions of interaction quality, of the quality of the physical environment and of the overall system quality were significantly higher for older individuals than for younger ones. Thus, Ganesan-Lim et al.’s (2008, pp.550-561) research presents evidence that age affects perceptions of service quality and satisfaction.

2.5.4 Personal Service

Poria et al. (2010) claim that the topic of personal service is often neglected in tourism and air travel management studies. Their research represents some progress towards understanding the flight experience of people with disabilities (e.g. visually impaired passengers and passengers who are in need of a wheelchair or crutches). Their work does not specifically relate to older customers but their findings provide some insight into the travel experience of mobility-reduced travellers, the role of personal service and the question of whether passenger services fulfil expectations. In Poria et al.’s (2010) study, interviewees are aware that airlines are profit-oriented organisations. The interviewees are willing to pay for extra services that make their travel easier and their flight experience less onerous. It was important to them to be treated

respectfully. Poria et al. (2010, pp.216-227) recommend improvements that do not require considerable financial investments, but rather attentive and caring attitudes.

Work by Prebensen, Vittersø and Dahl (2013) allows for further exploration of the importance of personal service for the overall holiday experience. They provide a key study on the importance of single experience elements to the tourist-perceived overall experience value. Their study examines the effect of various factors on the whole journey. According to Prebensen et al. (2013, pp.240-261), the value of a tourist journey or experience relies upon many different single experiences. However, only personal service and the time and effort spent on the journey show a significant effect on overall experience value. The airport experience is not explored in greater depth.

John, Simons and Bouwman (2009) elaborate upon ideas on how to design personal service encounters within the airport environment. Their research takes place within an airport's transit area. It explores the question of how to design and to test user experiences that are affected by multiple service providers (i.e. airport, airline and third-party ground services providers). Personal service contributes highly to the passengers' satisfaction. Participation in the service encounter enhanced the comfort level of the users (John et al., 2009, pp.560-570). This is in accordance with the concept of value creation as part of the evolution of experiences, as set out in Table 2.3. Co-creation is part of 'Experience 2.0 (Co-Creation Experiences)' in Neuhofer and Buhalis' model (2014, p.131).

A further contribution on personal service at airports came from the Chief Executive Officer (CEO) of Bremen Airport in Northern Germany. He stresses the significance of personal service and customer interaction and claims that today's major airports are not designed with the needs of older customers in mind but solely in line with economic and logistical demands. According to him, older passengers show appreciation when

airport processes are manageable and straightforward, and when personal service is provided. The ease with which they travel through the airport represents value for them. As a result, the CEO perceives a business opportunity for regional airports because older passengers try to avoid passing through the bigger airports and choose smaller ones instead (Krane, 2011). This view ignores other factors that influence the passenger's decision for or against specific airports. However, one can conclude that at smaller airports more opportunities for personal interaction and service do exist. This raises the question whether older passengers do indeed prefer smaller airports because they are easier to navigate and allow for more personal service.

There is some evidence to suggest that personal service and communication play an important role in the passenger process but it is thin. Research by Kirk (2013, p.168) shows that social interactions between airport staff and the passengers are important to the overall experience. Passengers remember these encounters and discuss them in positive terms.

2.5.5 The Rise in Automatisation

Air transport and tourism travel have always been closely tied to the developments in the field of technology. The wish for personal interactions, however, stands in contrast to the rise in automatisation which influences the tourism industry (Cabiddu, Lui and Piccoli, 2013, p.86). Automatisation is introduced as measure to optimise processes and reduce costs. This section takes a look at the growing role of these technologies, mostly self-service, and their impact on the older consumers' service encounter within the airport environment. This examination takes place against the previous argument that older customers prefer personal service to automatisation.

Airports must decide whether self-service technology is perceived as an 'attractive experience for the customer or whether it detracts from the

overall service experience' (Alcock and Millard, 2006, p.72). This means that self-service technologies are judged by the benefits they can provide. Thus, the acceptance of self-service technologies goes beyond simple usability and efficiency. It plays a central role for the interpretation of the overall quality of the airport experience. According to Alcock and Millard (2006, p.77), automatisation has to offer a 'useful and usable customer experience, rather than a perceived decline in service delivery'.

The International Air Transport Association (IATA) pushes for more self-service to speed up the passenger process. IATA claims that about 75 per cent of all passengers worldwide want more self-service options (International Air Transport Association, 2015). The delegation of control to the passengers, results in lower operational costs for airlines, but this neglects the interests of the remaining 25 per cent of passengers who are not keen on further self-service initiatives.

IATA's 'Fast Travel Program' provides self-service options in six different areas of a passenger's journey: document scanning, bags ready-to-go, flight re-booking, self-boarding, bag-recovery, and check-in (International Air Transport Association, 2013). IATA assumes that airlines' and airports interests in that area overlap. While this is an interpretation that can be questioned, airports do comply. To match the airlines' interests and to expedite passenger flow, airports invest in and roll out various self-service solutions, particularly for check-in and boarding. E-gates, biometric-based technology and self-service kiosks (including self-service bag drop) are some of these initiatives.

Even electronic passport inspections to expedite border checks have been introduced by governmental agencies to reduce operational and staff expenses (Ghee, 2011). The integration of smart phones and the use of radio-frequency identification technology have also gained in significance within the passenger process. At some major airports in Europe (e.g. Birmingham, Amsterdam and London Luton) man-sized holograms as part of next-generation digital signage have been installed

in the terminal buildings. These ‘virtual assistants’ explain to passengers waiting to pass through security how to pack their liquids, toiletries, etc. It is meant to increase passenger flow and to minimise the stress for the passenger (Falconer, 2011). Personal service and human interaction are, with such measures, on the decline.

The travel industry report ‘Navigating the Airport of Tomorrow’ (Travel Tech Consulting and Amadeus, 2011) provides a comprehensive analysis of self-service technologies and how they affect the travel experience. The authors claim that demand for new information services and self-service is high. They identify three current major areas of passenger dissatisfaction: ‘service disruptions, long check-in lines and baggage issues’ (Travel Tech Consulting and Amadeus, 2011, p.4). The report states that the airport experience has an impact on the passenger’s perception of the airline but not on the airport. This is interesting insofar as it indicates that the service on the ground is tightly associated with the airlines’ product and not so much with the airport itself, as was pointed out by Bergadaà (2009) in Section 2.5.

Table 2.4 depicts a passenger’s way through the airport in the future. It demonstrates how emerging technologies such as self-ticketing, mobile boarding pass or baggage tracing are to redefine the travel experience at the airport.

Table 2-4 Navigating the Airport of Tomorrow

Widespread as of 2011	Widespread as of 2014	Widespread 2015 to 2020
Ticket kiosks to avoid queuing	Permanent bag tags using radio-frequency identification to find the location of missing bags	Personalised promotions based on passenger preferences
Electronic promotions for special offers	Augmented reality to improve passenger navigation	Near-field communication phones allow mobile payments
Mobile computing for more efficient passenger processing	Location-aware baggage so passengers can track their bag	Airport location tracking so airlines know where passengers and baggage are
Mobile boarding pass and ancillary offers via broadband	Self-service baggage drop and processing	Near-field communication archways for automatic check-in
		Swipe cards to manage faster boarding

(Adapted from Travel Tech Consulting and Amadeus, 2011)

In 2014, the features described as ‘widespread’ can be found at some international airports. While self-service baggage drop has been rolled out at a few airports, baggage tracking via radio-frequency identification is still in its infancy stage on a worldwide level. It remains to be seen how this forecast will develop until 2020.

To follow up all these trends, the airline industry founded a ‘Passenger Experience Management Group’ in 2010 to design the ‘passenger experience’ at airports and in the air (International Air Transport

Association, 2015). Driven by the airlines' aim of optimising operational processes and reducing costs, this group associates the improvement of the travel experience with the introduction of self-service options. On a similar note, a commercial website (PPS Publications, 2015) deals with the improvement of the passenger experience on the ground. It examines the entire travel process from the passenger's perspective. Accordingly, check-in, mobile technology, baggage, security, immigration, boarding, in-flight entertainment and connectivity, personalisation and arrivals all account for the term 'experience'.

2.5.6 Older People and Self-Service Technologies

Tourism researchers Neuhofer, Buhalis and Ladkin (2013, p.546) comment that '[t]he notion of experiences constitutes an important concept in the context of travel and tourism'. Their work confirms that these experiences are increasingly subject to value co-creation and technology use. Holiday experiences - and with that the airport experience - are increasingly self-service technology enabled.

Age is one factor that affects a person's level of acceptance or fear of technology. It affects their emotional well-being and stress levels (Herstatt, Kohlbacher and Bauer, 2011). In particular, older people without prior experience have problems using self-service technologies. The delegation of control to a machine, for example to a self-service check-in kiosk, feels unpleasant for some (Herstatt et al., 2011, p.11). It is essential that self-service functions are not forced upon users, otherwise acceptance of the technology decreases. There should be the option of human interaction and personal contact for people who do not want to follow the path of automatisation (Howard and Worboys, 2003, p.390; Peattie and Moutinho, 2005, p.31).

A central increasingly automated contact point at the airport is the check-in desk. Check-in is often the first point of contact with the core flight experience. For many, the service encounter there sets the tone for all

the customer contact points, on the ground and in the air, that follow. Wittmer (2011) is an air travel researcher who examined the acceptance of self-service check-in options at Zurich airport. According to him, trust in any new check-in procedures has to be established first, to strengthen their popularity. In his study, passengers appreciated the reduced waiting time that resulted from the new procedures, however, personal interaction at check-in was still important. The findings also show that leisure passengers still value the traditional, manned check-in counters. Although Wittmer's (2011, p.142) research does examine the group of older passengers in particular, it provides some insight into the expectations of technology by different age groups as 'they perceive the various check- in procedures differently'. Older people are more likely to be intimidated by these self-service technologies. This can be explained by a growing feeling of insecurity when people get older.

Work done by Lu, Chou and Ling (2009) at a Taiwanese airport examines passengers' willingness to use different self-service options. Some of the passengers prefer the manual check-in service to the self-service option, even if they have to wait longer. This is because passengers believe that their needs are satisfied when they interact with frontline employees (Lu et al., 2009, p.349). Lu et al.'s work does not break down its findings by age.

2.6 The Changing Role of an Airport

The sections that follow take a look at the changing role of airports in society, with a focus upon the effects of deregulation, privatisation and commercialisation.

Travellers need the airport to use air transport. An airport is primarily still an infrastructure provider for transportation. Its customers see it as a necessary step for transport from A to B. Passengers expect airport services to be delivered as cost-effectively and conveniently as possible

and with a certain level of quality. An airport is a means to an end, it enables the provision of airline services. Airports are ‘complex industrial enterprises’ (Doganis, 1992, p.7). They offer core operational services and traffic-handling services along with commercial offerings. Doganis’ definition shows that airports were already on their way more than 20 years ago to becoming service providers, rather than solely infrastructure. The days have gone when airports were only a provider of public utility, of public infrastructure and runway capacity.

Many airports today are run as businesses. Like any other commercial organisation, they are subject to public, economic, financial and strategic challenges. The role of an airport in that regard is to create financial value, i.e. to enhance its profitability by increasing commercial revenues. Revenues are generated on the aeronautical side through landing, parking and fuelling charges and ground handling fees, as well as passenger service charges, and on the non-aeronautical side through retail and parking. The non-aeronautical is increasingly gaining in importance. Commercialisation raises the question of the degree to which an airport still performs a role as a public service provider. Ageing travellers may ask for services that cannot be satisfied by purely commercial offerings.

Work by Parker (see Hannam, Sheller and Urry, 2006, p.16) takes a critical stance and describes airports as places of ‘the boring, everyday, routine, but essential operations, processes, systems and technologies, that enable global mobility to occur’. With this definition, the airport is an enabler of mobility. It provides the infrastructure but not a particular memorable or pleasant experience.

Anne Graham (2011, p.5), a key researcher into airport management, describes the airport’s development away from providing a public utility towards increased commercialisation:

> [M]any airports have proved over the years that they are quite capable of being operated as commercial, self-sufficient businesses, particularly in response to a more demanding, deregulated and competitive airline industry. Thus, the public service paradigm that views an airport as a public utility to satisfy the needs of airlines and passengers has been replaced with a commercial paradigm that views an airport as a business enterprise.

This increased commercialisation initially took place in form of shopping facilities within the airport terminal. 'More recently an emphasis has been placed on a full exploitation of the airport site and further diversification of business, with an expansion of airport-linked development in the vicinity' (Baker and Freestone, 2008). Section 2.6.5 explores this development further.

2.6.1 Deregulation

The following sections describe the historical developments that have influenced the role of airports in tourism and society. Airline deregulation in the United States of America began in 1978 with an Act of Congress. From that point on, US domestic airlines did not have to ask for regulatory approval when they wanted to start flying into a specific airport. It was expected that consumers would benefit from lower ticket fares due to more competition, 'increased range of price-quality options, and great improvements in efficiency' (Kahn, 1988, p.321). The success of deregulation in that regard remains questionable. A negative effect, for example, was that some airlines ceased operations on non-profitable routes. Some destinations in the US domestic market were not served any longer and air passengers had to look for alternatives. Conflicts did arise. Alfred E. Kahn (1988, p.316), an American professor who is referred to as 'the father of airline deregulation', comments on the drawbacks of (US domestic) deregulation:

> While the advocates of deregulation recognized that competitive markets are inherently more messy and unstable […] I doubt that most of us were fully prepared for the explosion of entry, massive restructuring of routes, price wars, labor-management conflict, bankruptcies and consolidations and the dismal profit record.

In the 1980s, the air travel market in Europe was also gradually liberalised. The final, third package of European air transport reforms came into effect. In 1993, European Union (EU) airlines were allowed to operate between member states without restrictions. By 1997, a regulatory framework existed in Europe that was similar to that in the United States of America (Button, 2004, pp.44-105). Airlines registered in the European Union were allowed to fly within and between all EU countries (the so-called right of cabotage).

Airline deregulation led to substantial growth in the low cost sector. This is one of the most important developments in the air transport industry in recent years (Graham, 2013, p.66). Low cost services generate traffic 'which otherwise would have travelled by other modes or not at all' (Graham and Dennis, 2010, p.130). The single aviation market led to the rise of European low-cost airlines such as EasyJet and Ryanair (Starkie, 2012, pp.40-41). They established operating bases throughout Europe and started serving new routes. This often created leisure demand in (and for) cities or regions that had previously not been served. Graham and Dennis (2007), in their analysis of the impact of low cost operations on airport traffic in the United Kingdom and Ireland, show that some low cost airlines use primary and regional airports while others decide in favour of small secondary airports. The latter in particular perceived the low cost development as an opportunity to attract customers (Barrett, 2000, pp.16-17).

Although the deregulation of the airline system progressed slowly in Europe, it was an important driver for stimulating airport competition (Barrett, 2000, p.16). Deregulation resulted in greater freedom for airlines

to serve markets and to open up new routes without the former constraints. This also resulted in a situation where airports had to compete with each other. They were not able simply to rely upon their infrastructure role. Instead of enabling air travel from A to B, they now had to take other shareholders' interests into consideration.

2.6.2 The Privatisation of Airports

With airline deregulation came airport privatisation. At the same time, airports have been challenged to accommodate rising demand and to weigh these developments against their task of providing an efficient infrastructure for a travelling society. Social task, such as catering to the needs of an ageing population, were not supposed to be affected by increased competition and reduced influence by the state. The role of the state was now reduced to providing the 'parameters for competition […] without affecting safety, social and environmental standards' (Ehmer, 2001, p.51). However, Zhang and Czerny (2012, p.30) voice their concerns about this. They point out that 'there may be a discrepancy between the welfare-optimal and private airport behaviors' as a result of airport privatisation and regulation. In the context of this study, this would be the case if the airport operator fails to meet the needs of older travellers.

The successes of airport privatisation vary and are difficult to measure. The advantages of improvements in an airport's efficiency are often contrasted with the question of whether the change in ownership leads to performance improvements or not. Oum, Adler and Yu (2006) compare efficiency across airports according to their form of ownership. Their results suggest that a mix of private and public ownership with minority private sector participation should be avoided, whereas a majority private sector ownership and operation is desirable. Halpern and Graham (2013, p.28) comment as follows on the success of privatisation:

> [i]t is often feared when airports have been privatised that they will abuse their market power and will not always operate with the interests of the airport users in mind, raising charges, reducing the quality of service and under-investing in facilities.

This statement implies that at a privatised airport, older passengers run the risk of receiving a passenger service of lesser quality and that their needs will not be fully met. Ison et al. (2011) describe this dilemma further. With increased pressure to operate commercially, airports face difficulties to when they try to cater for 'economic, environmental and social well-being' (Ison et al., 2011, p.1348).

A variety of airport privatisation models exist. Up to 2011, 80 countries worldwide had introduced some form of private ownership for their airports (Ison et al., 2011, p.1341). In their analysis of UK privatisation, Ison et al. (2011, pp.1341-1349) argue that the benefits achieved may have been obtained by commercialisation alone. According to them, airports do not have to be privatised to succeed in commercialisation. While the need for investments in infrastructure and operational efficiency improvements are identified as objectives of privatisation, many governments also perceived it as a means of avoiding the financial burdens that come with subsidising major investments in airport infrastructure (Freathy, 2004, p.192).

The evidence on the business performance of single airports after privatisation is not conclusive, and similarly it is not clear whether customer service and quality standards at an airport improve or decline as results thereof (Freathy, 2004, p.192; Graham, 2011, p.12).

2.6.3 Commercialisation

The increased popularity of airport privatisation worldwide has caused airport operators to define their commercial strategy in order to maximise airport revenue. These airports are run as businesses as Section 2.6 has

indicated. The ultimate goal of such an airport's economic activities is to create financial value, i.e. to enhance profitability by increasing revenues from commercial activities. In other words, public service activities are of lesser importance.

This raises the question whether a deregulated, privatised airport system, driven by commercial pressure, may face difficulties meeting its social obligations such as taking care of the needs of an ageing population by providing adequate infrastructure. Poria et al. (2010, p.224) think 'that it is the responsibility of airline management, as well as that of their countries of operation, to be socially sensitive and responsive'. Poria et al. (2010) refer to the flight experience of disabled passenger. This work extends this examination to the airport's responsibility towards its older passengers on the ground.

With the question in mind of how much regulatory intervention is necessary (Carney and Mew, 2003), the challenge that lies ahead for an airport seems to be how to balance revenue generation with its duty to provide a public service for all the different groups in its customer base.

2.6.4 An Airport's Competitiveness

Airports no longer find themselves in a monopolistic market position because of the developments described in the previous sections. They have to compete with each other (Doganis, 1992; Graham, 2011; Kasarda, 2008). Deregulation and privatisation are the two main factors that have created competition where there was none before (Starkie, 2002). How is competition among airports discussed in the literature and how can their competitiveness be enhanced?

Loo (2008) conducted a study at the multi-airport region of Hong Kong to gain a better understanding of the decision process of passengers when they choose one airport over another. She shows that passengers appreciate certain airport characteristics but, in reality, have little choice

when they decide in favour of or against an airport. Her research confirms that, for passengers, the ticket price, access time, flight frequency and the number of airlines are the most important factors. Airport access modes, access cost, the retail offering, and the time at check-in were also significant, although less so than the first set of factors. Loo (2008, pp.117-119) concludes that airport competition is all about finding a market niche and not about competing with one another directly.

Moutinho (2005) shows that passengers principally relate to airlines and not to airports. His findings show that individuals do not have clearly formed beliefs about most airlines. Utility for transport from A to B is high but there is little emotional involvement with the service offering as such. It can be expected that the emotional involvement of passengers with airports is even less. Airports play a secondary role in the passengers' decision process; decisions are based upon the offered flights in particular markets, followed by ticket price, and not based upon an airport's infrastructure or quality of the services and processes on the ground.

The passengers' decision for or against an airport may not be based upon the aforementioned factors but upon the airport's commercial offering. Kasarda and Lindsay (2011) use Dubai as an example, where passengers decide in favour of that airport's commercial offering. Dubai's airport is growing fast as a commercial and tourism hub in the Middle East, along with its national carrier, Emirates Airlines (Debagge and Alkaabi, 2008, pp.157-160). According to Kasarda and Lindsay (2011, p.315), passengers sometimes choose flights with a stop-over at Dubai's new terminal in order that they can benefit from the vast shopping experience that is offered there. Positioning the airport as the portal to Africa, India and China, the reasons for Dubai airport's recent growth go even further. As a hub airport it connects cities that are not served by non-stop services (Kasarda and Lindsay, 2011, p.301). For example, a popular route that is served via Dubai is Shanghai (China) to Nairobi (Kenya).

Frank (2011) examines different airport business models that try to make operations profitable. His work offers insight into the competitiveness of airports, albeit from a different perspective. It shows that there is no conclusive answer to the question of what makes an airport competitive. The business models of airports worldwide are too heterogeneous to allow for a clear answer. Frank (2011, p.31), however, concludes that the 'primary function of an airport is still to manage logistical flows of airlines and passengers'.

Finally, aviation researcher Park (2003) provides a more holistic approach to the structure of an airport's competitive advantage. He compares the competitive level of major East Asian airports and concludes that the competitive advantage of an airport depends upon five factors, categorised as spatial, facility, demand, and service and managerial. According to Park's (2003, p.360) findings, the demand factor is the most important one when defining an airport's level of competitiveness followed by the service factor.

Figure 2.3 shows Park's model for the structure of airport competitive advantage.

Figure 2-3 Structure of Airport Competitive Advantage



(Park, 2003, p.354)

The figure shows that the 'service factor' (and derived from that service quality) contribute to an airport's competitiveness. Thus, according to Park (2003), there is evidence that airports compete to some degree on the service they provide. Halpern and Graham (2013, p.142) note in this respect that:

> Perceived value is particularly important for service companies such as airports because of the intangible nature of what is being sold. It is difficult for customers to see and feel airport products or services or to compare the value of one airport product or service to another […].

Despite its intangibility, the service element is a source of competitive advantage. It affects the perceived value of the experience (Hamel and Prahalad, 1994, p.229).

2.6.5 Airports Turning into Service Providers

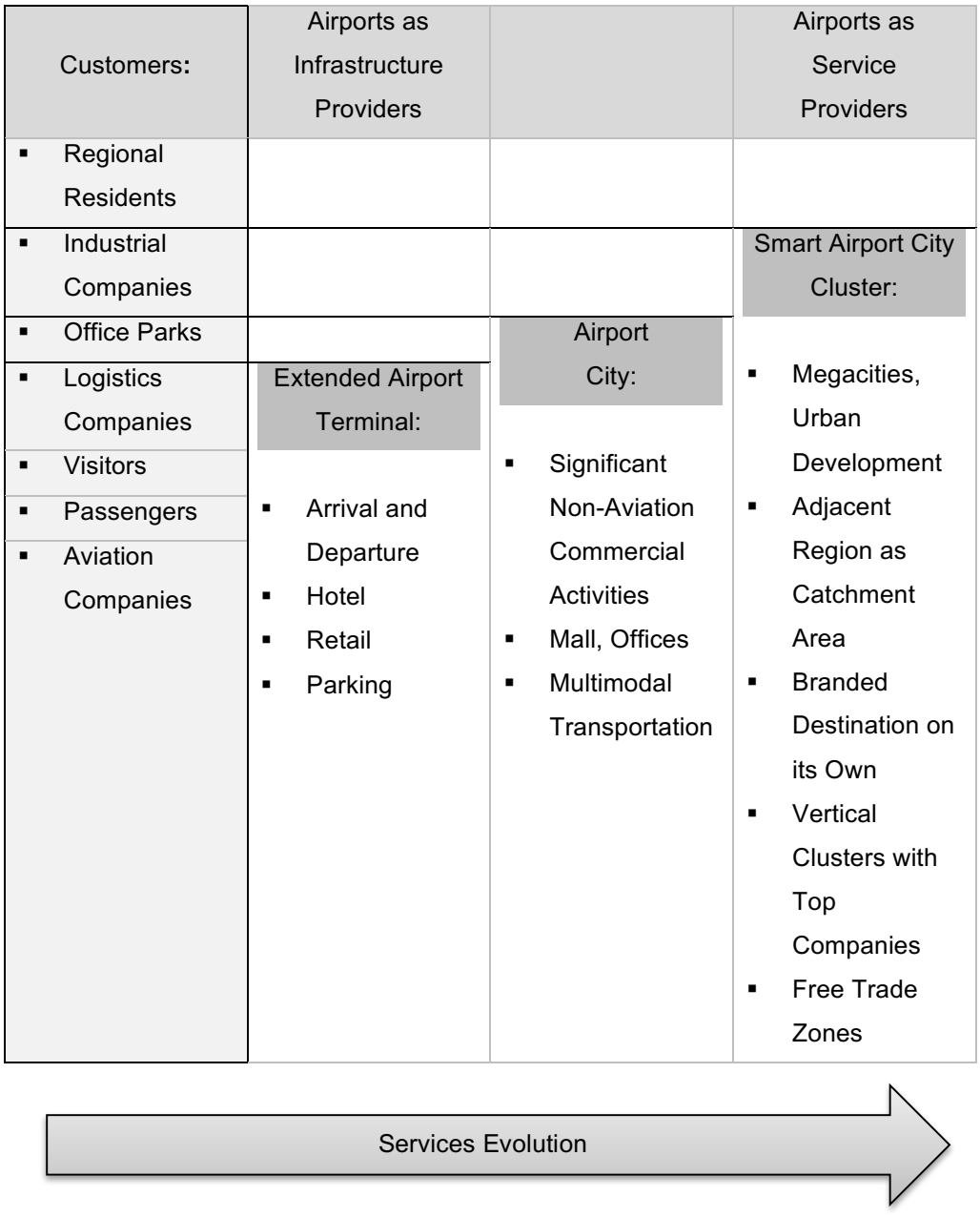
As the previous sections have shown, airport ownership diversification, airport privatisation and commercialisation have led to radical changes and increasing pressure on an airport's business model. An airport's purpose is no longer just the provision of an infrastructure. 'This socio-technical system [the airport] has been turned into a form of mass mobility that requires an exceptionally extensive and immobile place, the airport-city […]' (Hannam, Sheller and Urry, 2006). Similar to a city, the airport has to provide commercial and non-commercial facilities to meet the needs of its customer base (Graham, 2014, p.6). What role will the airport experience play in this context?

Kasarda (2008) develops a future vision for airports when he describes the concept of an 'aerotropolis' that evolves from an 'airport city'. The airport becomes a city in itself, a hub for regional growth and space for infrastructure to satisfy future demands of all stakeholders. A couple of major international airports have followed this suggested path already (e.g. Amsterdam, Dubai and Seoul). Charles et al. (2007) evaluate Kasarda's model from a management perspective. They challenge some of its assumptions and ask for a more balanced approach. In particular, Charles et al. (2007, pp.1009-1028) raise concerns about the aerotropolis' long-term sustainability, the question of energy provision, and the security of the infrastructure.

Janic (2008) is another researcher who investigates airports' past, current and future infrastructural development in greater detail. He looks at airport development along operational, sizing, design, and economic, environmental and social dimensions. Janic (2008, pp.113-115) acknowledges that their infrastructure development is subject both to direct external developments (from the aviation industry) as well as to indirect external developments (e.g. population ageing). Cisco, the Internet Business Solutions Group (Fattah et al., 2009), sees airports turning into 'smart airport city clusters'. The authors of this commercial

study claim that the development of airports, their service evolution, has not stopped with the airport city or aerotropolis. According to them, the role of an airport develops from infrastructure provider to service provider, as Figure 2.4 illustrates.

Figure 2-4 Airports Becoming Virtual Service Providers



(Adapted from Fattah et al., 2009, p.6)

This model is of significance for the present work's focus. It shows that the service concept is gaining momentum. As infrastructure provider, the

airport had to cater primarily to the needs of aviation companies, passengers and visitors. Now, airports are developing into service providers. Their customer group extends to logistics companies and office parks when the airport develops into an airport city. In the last step, an airport - in its role as a smart airport city cluster and service provider - has to satisfy the needs and demands of even more stakeholders, such as industrial companies and local neighbourhoods.

While future airport development provides airports with many options, the model by Fattah et al. shows that the provision of services is gaining in importance. As part of the service evolution, airports have to position themselves as service providers. They cannot solely position themselves as infrastructure providers, as in the past. How is this development perceived in the eyes of airport managers? Are they interested in competing on service or even on the service experience?

2.6.6 Airport Management and the Experience Approach

Social scientists and management researchers Johnston and Kong (2011, p.6) perceive ‘a knowledge gap about how, at a more strategic level, organisations can go about improving specifically their customer experiences’. Gaining a competitive advantage through the provision of a memorable experience appears to be crucial for service organisations in general but not for airports. If the objective is to provide a solid functional value for older travellers, an adequate value proposition would include the improvement of service quality through co-creation in the core passenger services.

From a strategic management perspective, Aaker (2008, p.177) suggests that innovation is wanted, alongside improvements in the service offering along all the customer service touchpoints. Exceeding passengers’ expectations with respect to the value proposition may create new business opportunities. What this value proposition might look like at an

airport is described by journalist Feldman (2009, p.22) in the industry publication *Airport World*.

> The airport value proposition now must go far beyond simply impressive architecture, to address how customers experience the airport asset and so create the '*airport as a destination'.* Customers, whether they are airlines, passengers, concessionaires or other businesses operating from the airport, must be given a reason to choose one airport over another, perhaps even over an airport closer by.

Similarly, to the idea of 'the airport as a destination', Hannam, Butler and Paris (2014, p.173) describe the airport as a 'distinct social space […] that orchestrate[s] new forms of social and cultural life'. This is driven by an increasing global demand for tourism travel. For an airport operator, this implies the need to design age-friendly passenger services and provide appropriate infrastructure that accommodates the needs of older travellers.

The concept of the interpretation of the role of an airport as a destination is controversial. Kasarda (2008) sees an airport evolve into an 'aerotropolis'. Kasarda's interpretation is congruent with Feldman's (2009) description of the 'airport as a destination' in itself. It collides, however, with research that emphasises that an airport fulfils the basic task of providing an infrastructure to enable mobility and that not every organisation that provides a functional value needs to provide an experience (e.g. Basole and Rouse, 2008; Parker (see Hannam et al., 2006, p.16); Poulsson and Kale, 2004, pp.275-276).

2.6.7 Airport Management and Ageing

Gerontology is the study of ageing and as such is a rich area for scientific enquiry of the investigated phenomenon of this work. Studies in management, tourism and air travel overlap with gerontology in some areas. They address the issues regarding ageing, consumer behaviour

in older age and the greying of society from their specific perspectives. One of the key messages of gerontologists which informs the present work reads:

> For many years gerontologists have been arguing that the environment should be built for all ages (and disabilities) to facilitate ageing in place. This implies designing and building [...] transport systems and public spaces that are accessible to all ages (Bond et al., 2007, p.303).

On a similar note, the World Health Organization (2015, p.5) calls upon cities worldwide for the creation of 'age-friendly environments'. Manchester (England), for example, is 'leading the world' in supporting older people. Manchester is among other cities that 'are blazing a trail in finding ways to support an ageing population' (Organisation for Economic Co-operation and Development, 2015). This call for the creation and provision of 'age-friendly' environments is answered by some cities and communities worldwide. However, it seems that it is left unanswered by 'airport cities'. Population ageing gains little attention in air transport literature. This is despite the development that airport design that facilitates the travel of older people becomes more important because they represent an increasingly important segment of the consumer market (Hunke and Gerstner, 2006). This development calls for an adequate infrastructure and passenger services to enable mobility for all ages. The airport operator that is in charge of the airport product is asked to provide this.

The majority of management studies focus on the improvement of the customer experience from a marketing perspective. While marketing scholars Thompson and Thompson (2009) claim that few organisations manage to adapt their service offering to older customers, Kohlbacher et al. (2010) voice their concerns that organisations know little about their demands. They warn that organisations that do not cater to changing market demands and adjust their offerings accordingly fall behind. According to them, the 'Silver Market Phenomenon' will not only be an

opportunity for organisations but also for 'innovation and invention, creativity, learning and social response and responsibility' (Kohlbacher et al., 2010, p.9). To seize upon these opportunities, service offerings for older people have to be designed with that segment's particular needs and characteristics in mind (Kohlbacher and Herstatt, 2008, p.23).

2.7 Conclusion

Tourism and transport researchers Landré and Peeters (2011, p.276) contend that there is a 'deep gap between tourism and transport research communities'.

This literature review has revealed that research at the interface of tourism and air travel which addresses population ageing and explains the specific experience of older leisure travellers is thin. No study was found that takes a holistic approach to the service experience of older travellers at an airport. Although the popularity of air travel in older age is constantly rising, no research describes the older leisure travellers' expectations of this part of their journey in a comprehensive manner. On the demand side, the chapter has shown that little is known about older leisure travellers' characteristics, expectations and needs when it comes to their service encounter at the airport.

A holistic description of the passengers' experience is missing. This holds true not only for the passenger experience in general as pointed out by Fodness and Murray (2007, p.493) but for older passengers in particular. On the supply side, there are also few studies that explore how airport management addresses changes to their customer base. Most of them have a focus upon a certain aspect of the passenger process. In particular, increased automatisation gets attention (Cabiddu et al., 2013). Special issues of people who travel with reduced mobility are addressed by some researchers (e.g. Chang and Chen, 2011; 2012). These studies,

however, do not address the full diversity of ageing (The World Health Organization, 2015a, p.3).

The review has explored the conceptual framework of the service experience and how it can be applied to examine the treatment of older people at an airport. With the airports' evolving role as service providers for tourism, this approach is valid. Tourism research emphasises the airport's role as a service provider for tourism activities. It remains to be investigated what role the airport experience plays both for the older travellers themselves and for airport management. This investigation has to take place against the changing role of airports in today's society. The majority of transport studies have focussed on airports becoming service providers; however, little insight exists on whether they are part of the service experience economy. From an airport management perspective, the literature review has illustrated that deregulation, privatisation and commercialisation have changed the role of airports. Given the constraints they are under, the question is whether airports provide a sound infrastructure and a service offering to cater for the needs of an ageing travelling population.

All identified gaps in the literature contribute to the overarching research theme: the investigation of the service experience of the leisure traveller who is 60 years or older at a major international airport. It aims to contribute to a better understanding of older travellers' experiences in the airport context from different perspectives.

As a result of these findings, there are three principal research questions:

- What is the airport passenger experience of older leisure travellers?

- Do older passengers need special treatment in an airport?

- How is airport management responding to older passengers?

3. RESEARCH DESIGN AND METHODOLOGY

3.1 Introduction

The purpose of this chapter is to discuss the work's methodology. It describes how the research was designed to explore the airport experience of the older leisure traveller. Sedgley et al. (2011) provide the framework for this design. They advocate cross-disciplinary investigations in tourism and ageing. Research should aim to include older people, to obtain 'personalised accounts of tourism experiences in later life' (Sedgley et al., 2011, p.423).

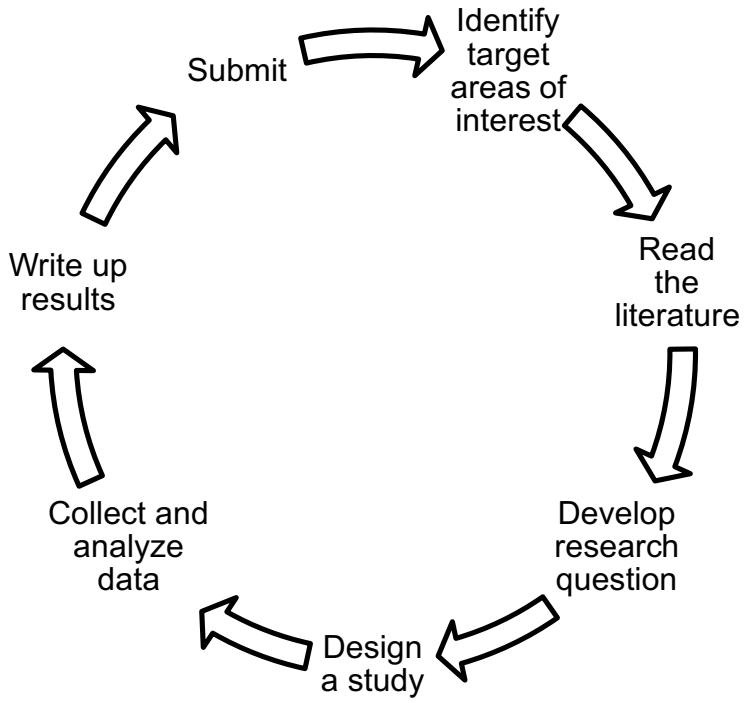
The chapter starts with some thoughts on research design in the social sciences, management research and the case study method. Section 3.3 then describes how data was collected from interviews with management, frontline employees and older leisure travellers. Observations served to complement this data-gathering process. Both methods are described before a closer look is taken at the role of the researcher and potential ethical issues. In Section 3.4, the discussion elaborates upon the analysis of the collected data. It explains the data's transcription and translation. Thematic analysis with a focus upon a two-cycle coding process is described. The chapter concludes with a discussion of the identified constraints in data quality that lead to the research's limitations.

3.2 Research Design

Research in the social sciences addresses the relationship between the individual and society. It examines the effects of social, political and economic change. Its objective is not to provide specific answers but to stimulate discussion (Miles, 2001, p.15). Within the context of the present work, the airport experience of the older leisure traveller is regarded as the result of the individual and social interpretation of social change.

Social theory allows for reflection upon this change by describing its effect on older passengers. Thus, it describes meanings, produces descriptions and seeks understanding of a certain situation or phenomenon (Gephart, 2004, p.457). The work acknowledges that in order to understand social change, one must interpret it from the perspective of the individuals involved in it. Research has to be a participatory, dialogic process (Kelemen and Rumens, 2008, p.28). This approach results in a fuller understanding of a particular phenomenon because it draws from a broader set of experiences (Moses and Knutsen, 2007, p.244). The research followed the different phases for conducting field research described by Edmondson and McManus (2007). This approach emphasises the interactivity of a series of distinct research steps, as set out in Figure 3.1.

Figure 3-1 Field Research as an Interactive, Cyclic Learning Journey



(Adapted from Edmondson and McManus, 2007, p.1174)

All research activities aim to contribute to the development of a coherent and valid argument. Moreover, the design takes into account the different 'economic, political and social contexts in which actions take place' (Johnson and Duberley, 2000, p.132).

3.2.1 Management Research

Management research as a subjective and participatory approach is not without criticism. In particular, it is critiqued for its lack of practical relevance. Pfeffer and Fong (2002, p.86) go so far as to contend that little influence flows from academics to the industry. Weick (2001, p.75), however, is of the opinion that this relevance gap is mostly a product of misconceptions on the part of both practitioners and academics. This work's intention is to contribute to minimising this relevance gap. It aims to produce knowledge that is useful for both academics and industry (Starkey and Tiratsoo, 2007, p.146; Tranfield and Starkey, 1998, pp.341-353). To achieve this objective, the research questions of this work are approached from a pragmatic point of view. Pragmatists consider the research question to be more important than the chosen method or the underlying social theory (Tashakkori and Teddlie, 1998, p.21). The methods used to explore the research questions should be selected primarily on the basis of their ability to show how things are done in a specific environment. In the present research context, the interview questions had to mostly be 'how' and 'why' questions. The objective was to explore these questions while being problem-focused and oriented to real-world practice.

Flick (2007, p.25) stated that the quality of management research should be judged with respect to its overall contribution, that is, in terms of how it provides 'new insights' and allows for 'practical consequences or the discovery of new problems'. This pragmatic stance aims to improve the human condition (Huff et al., 2006). In the context of this research, this implies the design of a better airport experience and, in particular, one which enhances mobility in older age. To what extent the situation of

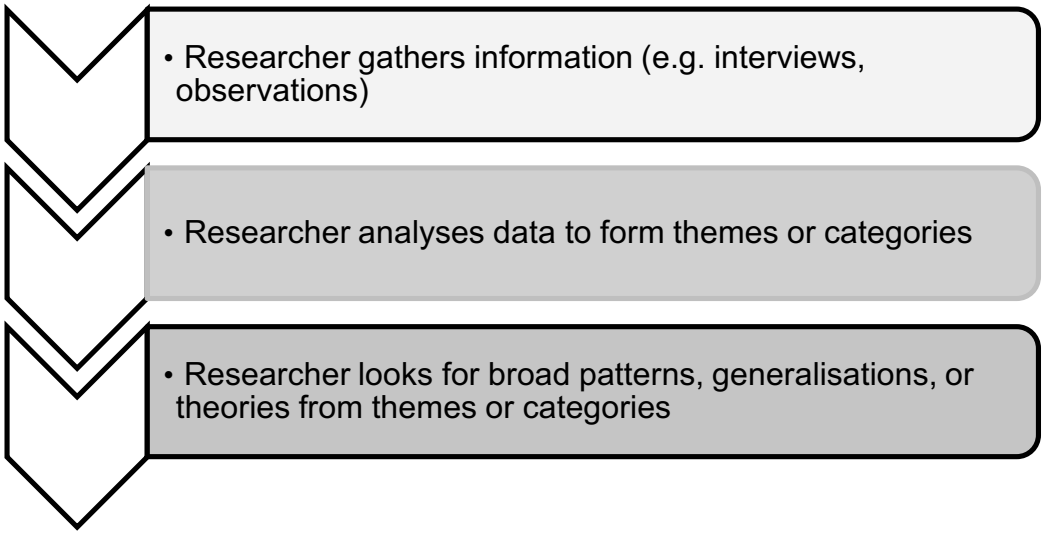
older leisure travellers might improve as a result of the work's findings remains to be seen but the objective is to stimulate change to existing approaches where these are deficient (Alvesson and Deetz, 2007, p.131).

3.2.2 The Nature of Qualitative Research

To explore the full data richness of the research questions, it was central to understand how the three interview groups (older travellers, frontline employees and managers) interpreted the dimensions of travelling as an older person. It was important to learn how managers and frontline employees perceive older leisure travellers and how these older passengers themselves experience the airport. A qualitative approach provided for this necessary depth of insight. It offered the opportunity to learn about a phenomenon from the individuals involved in it. Thus, the qualitative approach aimed '[t]o describe, decode, translate and otherwise come to terms with the meaning' (Van Maanen, 1988, p.9) of the airport experience of older travellers.

To examine the dynamics present within the airport environment, data was needed that made a search for meaning, ideas and relevant issues possible (Peterson, 1994, pp.487-489). The decision to rely upon qualitative enquiry is supported by Morgan and Xu (2009, p.11), who note that 'a service experience is inherently interpretative, subjective and affective'. Qualitative research allows for learning about people's perceptions, feelings, thoughts and experiences in greater depth. Although a qualitative approach is often more time-consuming than a quantitative method, the 'time to effort ratio' (Brotherton, 2008, p.129) is warranted when the data analysis stage is reached. The qualitative approach allowed the three key research questions to be answered. It followed the inductive logic described by Creswell (2003) (Figure 3.2).

Figure 3-2 Inductive Logic of Research in a Qualitative Study



(Adapted from Creswell, 2003, p.132)

Themes were developed and then narrowed down in the process of the inductive enquiry. Inductive reasoning assumes that generalisations can be developed from similarities across the collected data. Its focus is upon the generation of meanings and ideas (Alvesson and Deetz, 2007).

3.2.3 The Case Study Method

According to Yin (2014, p.2) a case study is a preferred method when 'how' and 'why' questions need to be addressed, when the researcher has little control over the events and when the focus is upon a contemporary phenomenon. This work's research focus fulfils all these three requirements. It aims for a holistic investigation of the airport experience of older travellers; the phenomenon ('ageing leisure travellers') is closely intertwined with the context ('airport'). Little control over the variables exists.

Gummesson (2008) elaborates upon those characteristics that qualify for case study research. According to him, case study research is particularly

useful when there is little prior knowledge of the phenomenon investigated and relationships are complex (Gummesson, 2008, p.38). Case study research is a qualitative approach in which a phenomenon is investigated 'over time, through detailed, in-depth data collection involving multiple sources of information' and 'a case description and case-based themes' are reported (Creswell, 2007, p.73).

Case study research is a popular approach in tourism studies in general and in investigations of the tourism value chain in particular (Song et al., 2013, p.19). The service experience at an airport is defined as a part of the tourism value chain in the context of this work. The case, with all its interactions and complexities, formed the basis for describing, understanding and explaining older leisure travellers' experience at an airport (Hamel with Dufour and Fortin, 1993, p.39). The work follows Wolcott's (2009, p.85) interpretation of a case study who regards it as a genre for reporting rather than a strategy for conducting research. The single setting allowed for an exploration of the various aspects involved in relation to each other while taking into consideration the environment and all the external and internal factors that played a role throughout the course of the research process. The decision for a single case study was supported by the need to elaborate upon multiple perspectives (i.e. three groups of interviewees, interviews and observations). It provided a method for making social science useful (Byrne, 2009, p.9).

The single case study approach is often criticised for its lack of representativeness and lack of rigour in data collection and analysis (Gibbert, Ruigrok and Wicki, 2008, p.1472) Often, these potential weaknesses are linked to selection bias (Flyvbjerg, 2011, p.314; Hamel et al., 1993, p.23). Yin (2009), however, asserts that a single-case design is justifiable in business-related studies when the case is sufficiently rich. Its strength is that it provides specific answers and helps to build an extensive and complex understanding of a certain phenomenon (Yin, 2009, p.52). Siggelkow (2007, pp.20-24) also defends the use of single case studies. He counters the criticism of single cases having a small

sample by arguing that a single case can produce full, rich data relating to a conceptual argument.

Another point of criticism is that case studies can be associated with consultant work and therefore lack academic relevance. In the context of this work, however, the managerial implications are not over-emphasised. The primary focus of the work is on making a contribution to academic knowledge (Gummesson, 2000, p.2).

3.3 Data Collection

This section describes how the field research was set up. Contributing to the initial idea for the research were some observations made by the researcher herself at the airport in Frankfurt. The two sources of information for the enquiry were observations and interviews, complemented by secondary data (Gephart, 2004, p.458). Throughout the data collection, it was assumed that the airport setting could be regarded as a microcosm of how a public transport infrastructure or service provider deals with an ageing society.

The decision to collect data within a single setting is supported by Denscombe (2010, p.57), who observes that this decision can be made

> on the basis of specific attributes to be found in the case - attributes that are particularly significant in terms of the practical problem or theoretical issue that the researcher wants to investigate.

The setting was ‘sufficiently small’ and ‘provided a variety of relevant, interconnected data’ (Holliday, 2002, p.38). It allowed for various perspectives to be taken into account. The resulting richness of the data, albeit from the single location (Frankfurt Airport), allowed for in-depth analysis and generalisations.

3.3.1 The Case Setting

The research took place at Frankfurt Airport, Germany. Germany is located at the centre of Europe, and its airport system is characterised by a wide geographical dispersion of airports with varying passenger volumes. Most of Germany's air traffic is non-domestic, due to the country's relatively small size, the closeness of its economic centres and the popularity of other modes of transportation, i.e. train, car and bus (Wolf, 2001). Although Frankfurt Airport also caters to business traffic, it is a major international airport for leisure travel. This traffic mix allows for an analysis of the full spectrum of experiences of different types of older travellers.

Germany ranks third in the world in terms of population ageing (see Table 2.2), with 26.8 per cent of its population aged 60 or over in 2013 (United Nations, Department of Economic and Social Affairs, Population Division, 2013, p.94). Life expectancy is on the rise at the same time as the birth rate is declining. In 2010, 16.8 per cent of the total population of 80 million was over 65 years old. In 2050, this group is forecast to account for 23 per cent. The average age is projected to rise from 34 to 64 years over those 40 years. One-third of the population will then be 60 years and older. Twelve per cent will be 80 years and older. The life expectancy of children born in 2060 is forecast to be 85.0 years for boys and 89.2 years for girls. Assuming the birth rate remains constant at 1.4 children per woman, the country's population is projected to decline to 75 million by 2050 (Statistisches Bundesamt, 2011a and 2011b), although changes in migration (e.g. the Syrian refugee crisis in 2015) and birth rates might affect the actual figure enormously. These developments can slow down population ageing, however, they do not put a stop to it (Seniorresearch Institut für Seniorenforschung, 2015).

The following sections describe how data was collected through semi-structured interviews and non-participant observations at this location.

3.3.2 Semi-Structured Interviewing

Once a qualitative case-study approach had been selected as the most suitable method, the decision was made to construct knowledge through qualitative interviewing. Alongside observation, ethnographic fieldwork, discourse analysis and textual analysis, interviews are one of the five main methods used in qualitative research (Travers, 2001, p.2). They are one of the most common qualitative methods for data collection (Easterby-Smith, Thorpe and Lowe, 1991). The interviews were conducted face to face. Each interviewee was asked a set of similar questions but adaptations and explorations were allowed. This semi-structured interview format permitted the interviewees to narrate freely, albeit within certain limits. The following sections describe the interview process in greater detail.

3.3.2.1 Interviewee Selection

In addition to members of the travelling public, the sample consisted of frontline staff as well as managers from the airport operator, tour operators, airlines and third-party service providers (e.g. information technology and passenger handling companies). Frontline employees and managers were able to provide insight into how their companies deal with older clientele. The passengers themselves described what their journey through the airport looked like, and what their expectations and needs were. Together, these three interviewee groups allowed for a holistic, multi-faceted description of the airport passenger experience of older leisure travellers.

The interviewees were selected based upon their potential to contribute to the research questions in stimulating, controversial ways. They were selected based upon their representativeness and were chosen according to the following three requirements: They should be knowledgeable, they should be willing to talk and they should represent a range of different perspectives on the research question (Rubin and Rubin, 1995, p. 66).

Potential interviewees were approached according to the researcher's personal interpretation of their suitability to contribute to the research in a meaningful way. Passengers were approached by the researcher on a random basis, however, the initial interview questions tested whether they fit the required profile for the interview. More selection bias existed among management and frontline interviewees. Potential interviewees were approached according to their job title and functions. This subjective selection process led to one of the limitations of this work because it affects data quality: it did not result in a pure random sample. However, a more standardized, albeit more random, selection process would have resulted in potential loss of relevant viewpoints and facets. Despite possible bias, this selection process allowed for relying is upon various and highly knowledgeable informants who approach the phenomena from diverse point-of-views (Eisenhardt, 2007, p. 28).

According to their backgrounds, the interviewees can be categorised into three groups: management, frontline personnel and older leisure travellers. To the first group ('Manager') belonged middle and upper managers employed by the airport operator, station/operations management as well as managing directors from service providers at the airport. The interviewees in this first group possessed, due to their professional experience, a certain stock of knowledge on the topic. The second group, frontline personnel ('Frontline'), were mostly flight attendants, travel agents and check-in as well as ticketing agents. Their daily work with older passengers qualified them to comment on the topic. The third group ('Passenger') consisted of travellers older than 60 years who arrived at, departed from or transited through the airport. Their knowledge was based upon their personal experiences and perceptions when travelling through the airport.

This last group covered a wide range of characteristics, in accordance with the heterogeneity of this group of travellers (see Section 2.3). Some were in their early 60s and very mobile; others in the same age bracket were restricted in their mobility. There were also interviewees in this

group who were in their 80s and still healthy, while others within the same age range relied upon personal assistance and/or wheelchairs to travel. The older leisure traveller group was broken down into age ranges in intervals of five years; the first range was from 60 to 65 years, the last one over 80 years. This array of age ranges and physical characteristics contributed to the reporting of a wide spectrum of experiences.

3.3.2.2 The Conversational Guide

The three groups were interviewed with the help of 'conversational guides' specific to each.

The evolving emphasis on the older leisure traveller, however, made it necessary to change some questions of the conversational guide for passengers in the second and third rounds of interviews. The conversational guides are shown in Appendix 1. They were set up in accordance with Flick's (2009) suggestions on episodic interviewing. The episodic interview is a form of triangulation. In an episodic interview 'question/answer sequences [are] triangulated with narratives' (Flick, 2009, p.83). This results in a mix of different levels of knowledge.

The conversational guides contained three categories of questions: main questions, probes and follow-up questions. The use of these varied throughout the different interviews and was subject to the course the interview took. To avoid ambiguity, all questions were kept brief and simple. They were designed to contribute to knowledge generation and an informative interaction (Kvale, 2007, p.57).

One question on the importance of the different service points in the passenger process (Question 4 in the frontline interviews, Question 7 in the first and Question 10 in the second and third round in the passenger interviews) asked interviewees for a ranking. For this ranking, the Likert scale was used which is a quantitative scaling method.

Background knowledge from other sources such as research on the industry helped to structure the main questions for the interview. Holstein and Gubrium (1995, p.3) describe the interview as an active 'search-and-discovery mission' whose ultimate goal is to engage in the generation of meaning. This interpretation set the tone for the interviews. It was important to listen closely to the interviewees as they described how they perceived and felt about certain situations. The intention was to find detailed and rich descriptions of the older leisure traveller's airport experience in order to gain a full understanding of the research questions.

3.3.2.3 The Interview Situation

The interviews took place in different locations, to accommodate the interviewees' needs and respect their time constraints. This allowed for an active engagement with the topic, while its style was conversational (Mason, 2002, p.225). Furthermore, an atmosphere of trust for mutual disclosure was deemed important (Holstein and Gubrium, 1995, p.12). The interviewees were encouraged to be frank and open. The aim was to capture as authentically as possible the three groups' views.

To obtain full consent for the use of a recording device and to make the interviewees more comfortable, the interviewees were briefed prior to the start of the interview on how the recordings were to be used, how the data would be stored and how it would be transcribed. It was explained to them that the raw data was to be stored upon completion of the work for seven years and then destroyed. Interviewees were assured that the data would be used exclusively for research and not for other purposes. This approach addressed concerns that data of a sensitive nature (e.g. critical remarks by frontline employees and management) would dealt with in an appropriate manner. All interviewees signed a consent form, shown in Appendix 2.

Sometimes it was necessary to elaborate upon the conversational guide to ask specific follow-up questions to explore thoughts and perspectives.

One of the strong points of qualitative interviewing at such moments is that the questions can be adapted to changing situations. This flexibility turned out to be an advantage in the interview situation when the older people, in particular, digressed from the focus of the research.

Following the 'norm nowadays' (Oliver, 2010, p.46), the interviews were recorded with a digital voice recorder. Four pilot interviews (one with management, three with passengers) were conducted, in 2011. The results of these four interviews were not included in the analysis because some interview questions were modified thereafter. The first round of interviews with participants from all three groups took place throughout 2012. Those 40 interviews consisted of 16 with management, 11 with frontline employees and 13 with older passengers. In the spring of 2014, a second round of 12 interviews with older leisure travellers took place. This was supplemented by another 10 interviews with the same group in a third round in November 2014. This resulted in a total of 66 interviews including the four pilots.

The duration of the interviews varied. Those with frontline employees lasted on average 29 minutes. The interviews with management lasted on average 38 minutes. Appendix 3 provides a sample (Manager10) of a full interview transcript. The interviews (excluding the pilot interviews) with the 35 older travellers lasted on average 17 minutes. The reasons for the second and third round of interviews with passengers were threefold. First, the interviews were on average shorter than with the other two groups and so resulted in less data being gathered. Second, the engagement with the literature made it necessary to explore this group's interpretation of the service experience further from their own perspective. Third, confirmation of already collected data and emerging themes was needed. An overview of all the interviews conducted is given in Appendix 4.

3.3.3 Observations

Observations are a popular tool in the social sciences to collect qualitative data. Other research methods to collect additional data to supplement the interview data were considered at the beginning of the research process. These included focus groups, panel discussions and online surveys. Secondary marketing analysis of existing sources (i.e. market research from the airport operator's archives) was also initially considered.

However, the idea of combining the qualitative approach with quantitative data collection was rejected because the research primarily intends to gain insight into people's feelings, attitudes, perceptions and interpretations of their individual experiences. It was important to allow for the expression of subjectivity in the research process.

Observations are popular to supplement existing data collected using other methods (Handley, 2008, pp.142-144). Data collected from the observations enabled the researcher to describe the situation of older passengers at the airport terminal in greater depth. In some instances, they allowed for the following up of certain themes that had emerged from the interviews. By checking for behaviours in the field, a better understanding of the research questions was possible. This is in line with Miller and Glassner's (1997) suggestion to use observations to gain a detailed understanding of the studied phenomenon. Observations 'provide researchers with [...] direct and varied experiences' (Miller and Glassner, 1997, p.4).

Observations were conducted when the researcher noticed older people in the terminal and walked up to them to see what situations evolved throughout their passage. This approach taken to select observations could be enhanced in future research. A more random approach to the sample would improve data quality. In some observations (Observation5, 6, 8, 14, 21, 27, 30, 34, 41, 44 and 50), the passenger process took place without service interruptions. No factors were identified to impact the airport experience of these passengers in a negative way. In all other

observations, the passenger process did not run smoothly for older people. The discussion of these observations in Chapter 5 and Chapter 6 aims for a balance between the positive and the negative experiences to provide a full, non-biased understanding of the airport experience.

3.3.3.1 Participant Selection

All observations were conducted in a non-participatory form. The researcher took on the role of a covert observer. The observed individuals were not aware of being observed. Thus, the observation did not interfere with their actions or words. The observer had no contact with them. In this role, the researcher was either hidden from view while observing the situations or she was in plain sight but not noticed because of the busy public setting. During the observations, the researcher did not make any recordings. After the observations, written notes were made. In some instances, these notes were elaborated upon the next day, when they were re-read and checked for completeness.

Older travellers were observed in different situations within the airport terminal. Their age was estimated to be between 60 and 95 years, on the basis of their physical appearance alone. Thus, the findings were subject to the researcher's interpretation of the older people's age. The estimate of people's age was based solely upon the researcher's interpretation of physical and other apparent characteristics. This results in a limitation of the findings because an objective assessment of age was not possible. Some people appeared to be in good physical shape. Others were showing signs that they were restricted in their mobility (e.g. using a walking stick). A few older travellers were sitting in wheelchairs or were otherwise restricted and relied upon assistance. Besides their level of mobility, no other characteristics were taken into account. The research differentiated only between older mobile passengers and passengers who were reduced in their mobility.

This simplification in the selection process led to another limitation of the

work. The majority of international air tourism traffic consists of either passengers, who travel for leisure purposes or who visit friends and relatives (VFR). VFR can be regarded as an additional leisure purpose (Graham, 2008, p.22). It constitutes a large proportion of world tourism but available data is limited (Jackson, 1990, p.10). While interviewees were asked about their reason for travelling (i.e. going on holidays), it was not possible to identify clearly their reason for flying in the observations. The motivations for deciding in favour of the aircraft as preferred mode of transport can vary. Clues (e.g. in the overheard conversations) served as possible identifying factors. In some instances, however, it could not be ruled out that the passengers' motives for flying were different. In Observation3, for example, the older man might have been a business traveller, a person who owns property abroad or someone who is visiting friends or family.

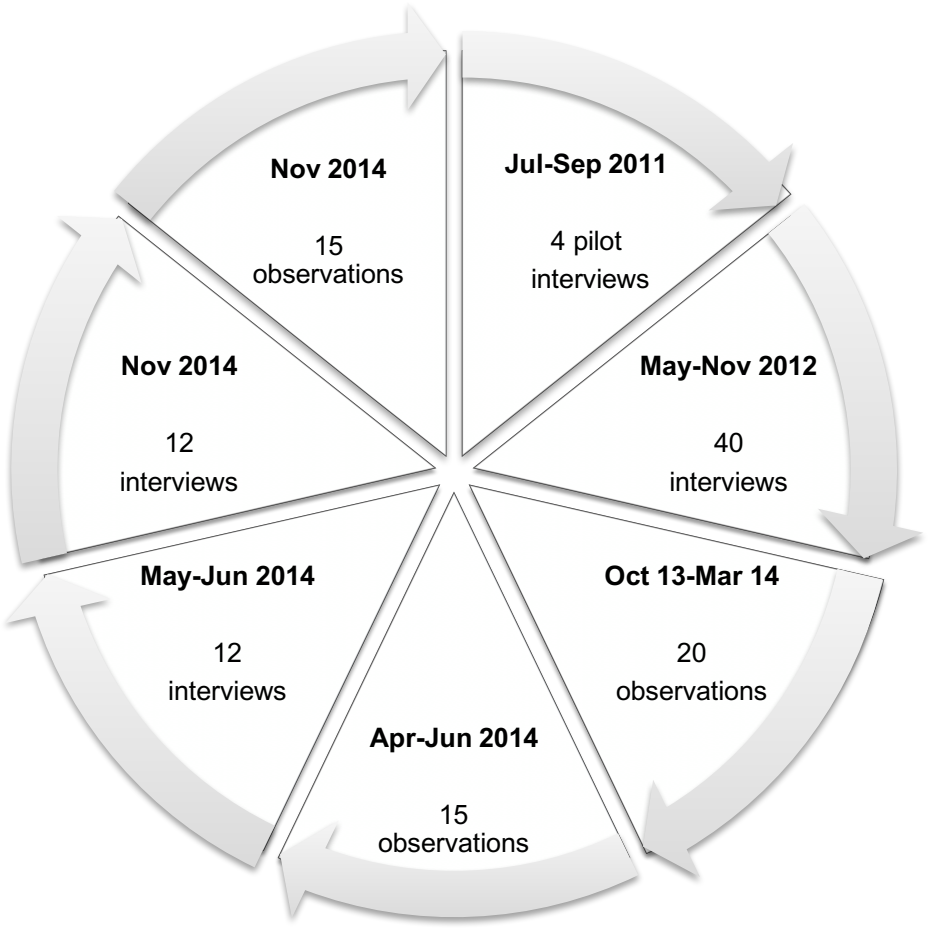
Holiday demand is more income-elastic than visiting friends and relatives traffic as research by Li (2008, p.12) shows. Furthermore, research by Letho, Morrison and O'Leary (2001, pp.201-212) emphasises that the nationality of the VFRs affects their travel expenditures. This is of importance because it stresses that the reason for travelling is one factor, among others such nationality, that affects travel and spending behaviors. Thus, the findings of this work are subject to an array of factors that were not clearly identifiable in the observations. Travelling for medical reasons (e.g. undergoing surgery in Eastern Europe) or owning a second home abroad (e.g. a summer home in the Balearic or Canary Islands) could also be reasons why people in the observations had decided in favour of flying. This limitation in data quality was also raised as an issue in the interviews (Manager10 and Manager12).

3.3.3.2 The Chronology of Data Collection

The observations started after the pilot and the first round of 40 interviews had been completed. With the emphasis of the research shifting from a management focus towards a comprehensive investigation of the airport

experience, it was important to gain more insight into the actual service encounter of this group from their own perspectives. In total, 50 non-participatory observations took place to complement the interview data. Some of them followed up on themes from the interviews, while others brought up new data. They put into context information provided by the interviewees. This combination of interview and observational data led to an iterative approach to data collection, as set out in Figure 3.3.

Figure 3-3 The Iterative Process of Data Collection



The observations were conducted in three rounds. The first round, of 20 observations, took place between October 23, 2013 and March 20, 2014. The second round, with 15 observations, lasted from April 22, 2014 to June 18, 2014. The third round, with 15 observations, served to complement and to verify existing data. It took place between November

5, 2014 and November 21, 2014. Some observations were only snapshots of service encounters of older leisure travellers within the terminal. They lasted three to five minutes. Other observations made it necessary for the researcher to follow travellers through the terminal buildings. They took longer. The longest observation lasted over an hour (Observation42). Appendix 5 provides an overview of all the observations.

After 50 observations had taken place, it became apparent that saturation was reached, as similar situations emerged. Together with interview data of 62 interviews with management, frontline employees and older leisure travellers, the dataset was considered to be sufficiently robust and rich. Neither interviews nor observations brought new insights. The decision to stop data collection was made in accordance with Sandelowski's (2007, p.179) argument that 'determining adequate sample size […] is ultimately a matter of judgement and experience in evaluating the quality of the information collected'. This is supported by Guest, Bunce and Johnson's (2006) criticism of the saturation idea. They argue that a specific number fails to provide a practical guideline for obtaining robustness in qualitative research. It is upon the researcher to decide when the dataset is robust.

3.3.4 The Role of the Researcher

Because the researcher works at Frankfurt Airport, a certain amount of subjectivity was unavoidable; her own experience, personal knowledge and professional background were present throughout the research process. This resulted in potentially biased responses but this dilemma was solved by avoiding subjective views on the issues.

Besides subjectivity, another risk that needed to be avoided was that the researcher saw the 'world at the airport' as too familiar and self-explanatory. To counteract this, the researcher tried to de-familiarise herself with the situation (Alvesson and Deetz, 2007, p.167). A sound

balance between existing knowledge and insight obtained through other sources to counteract the danger of pre-understanding a familiar environment was identified as being important (Gummesson, 2000, pp.60-81). As a result, Chapter 4, on the case context, was added to the work to provide additional information for the research.

3.3.5 Ethical Issues

Ethical issues can arise at all stages of the research process, from the design of the research, the selection of the methods, the interview situation through to the analysis and reporting stages. Research is considered to be ethically sound when no harm is caused to the participants and their individual rights are respected (Miles et al., 2014, pp.61-67).

Conducting research in the airport environment is not easy because of the needed approval by the airport authority. The reference to the work's partial sponsorship by the Erich-Becker-Stiftung helped in the approval process and enabled the researcher to gain access to commercially sensitive data. It can be affirmed, however, that at no point in time did the sponsor interfere in the design or objective of the research. Ethical standards as specified in their research guidelines and the sponsorship agreement were adhered to. Some commercially sensitive points (Figure 4-1 Passenger Share by Airlines, Table 4-6 Departing Passengers and Their Destinations, Table 4-7 Passenger Types at Frankfurt Airport and the absolute numbers of passengers with reduced mobility at Frankfurt Airport) will be removed for a second version of the work for public view. The removal of these parts does not impact the overall argument of the work.

The confidentiality of the interviews needed to be addressed, too. This was done through the signed informed consent statement (Appendix 2) that was obtained from all interviewees prior to the interview. It described the purpose and objective of the work, the procedure and how the

material was to be used. Its content helped to clarify the research objective and to answer any concerns. Confidentiality was assured and interviewees were offered an opportunity to share the key findings upon completion of the research. Anonymity was granted by coding the interviewees' names (e.g. Manager1, Frontline1 and Passenger1). This also allowed for greater objectivity throughout the analysis (Oliver, 2010, p.78).

As a result of these measures, the interviewees regarded the interview as a chance to reflect upon their work or their personal situations. Most interviewees were willing to participate and interested in the subject matter because the questions were part of their professional or private reality. To address the problem that some interviewees might be cautious about expressing their true beliefs and thoughts, the researcher offered them opportunities to rephrase what they had just said at any point, or to pause the recording. None of the interviewees exercised this right. Because material inducement is assumed to impact the interview situation (Oliver, 2010, p.60), nothing was given to management and frontline employees. The majority of the older leisure travellers who were interviewed did receive a small box of chocolates or were invited for a drink as tokens of appreciation for their willingness to participate.

The 50 non-participatory observations also raised issues of ethical concern. The observations took place without the individuals being aware that they were being watched and listened to. All observational data was filtered through interpretive perceptions and, as such, were, to a certain degree, subjective. However, as the observations followed up on themes from the interviews and took place in a public setting, this approach can be justified. All observational data is anonymous and the individuals cannot be identified.

3.4 Data Analysis

The objective of the data analysis was to identify the major themes and categories that provide answers to the research questions. Data analysis was not a separate phase in the research process; rather, it informed data collection and writing from the beginning. This cyclical process concentrated on the generation of meaning (meaning coding, meaning condensation, and interpretation). It is described by Coffey and Atkinson (1996, p.10):

> Analysis is a cyclical process and a reflective activity; the analytic process should be comprehensive and systematic but not rigid; data are segmented and divided into meaningful units, but connection to the whole is maintained; and data are organized according to a system derived from the data themselves.

NVivo (Version 9 and 10) software was used for the analysis of the interview and observational data. This qualitative analysis software package helped to sort and analyse all data in a systematic and comprehensive way. Prior to the analysis, it was necessary to get the collected data into the right format. The sections that follow describe how the collected data was transcribed and translated. Before the overall data quality is discussed, thematic analysis and the coding process are elaborated upon.

3.4.1 Transcription, Translation and Presentation

All analysis was made in English. However, it needed to be decided whether to conduct the interviews in English or German. As the level of the interviewees' English proficiency would have impacted the responses, the majority of interviews were conducted in German, the native language of the majority of the interviewees and of the researcher. Nine interviews were conducted in English. All transcriptions were done by the researcher herself. The research does not have a linguistic or conversational focus. As a result, the transcription of the interviews did not reflect on language, tone or grammar. The focus is on the information

content. It was decided not to use voice recognition software for transcription due to its lack of accuracy. It was also decided not to use a neutral, professional translator. Temple and Young (2004, pp.164-167) in their examination of translation dilemmas point out that there is no neutral position for translations. They conclude that if the researcher tries to be objective, it does not matter who does the translation, the result will be the same. To check on the accuracy of translation, four complete interviews were translated by another translator and there were no significant differences. Although time-consuming, this manual approach to transcription and translation allowed for an early in-depth familiarisation with the data.

In the description of the case context (Chapter 4) and in the presentation of the findings (Chapter 5 and Chapter 6), *italics* are used to indicate an emphasis by the author of this work. Ellipses in parentheses *[…]* are used to show an omission of text by the author. Without the parentheses …, they indicate a pause in the speech's flow of the interviewee or interviewer.

3.4.2 Research Themes

After all data was transcribed and translated, the next steps were to identify relevant themes and develop a coding system. For the analysis, the full English versions of the interviews and observations were used. Thematic analysis with the objective of 'noting recurring patterns, themes, or "gestalts" that pull together many separate pieces of data' (Miles, Huberman and Saldaña, 2014, p.277) was used at this stage. Thematic analysis puts into one category all the material that relates to one theme. Then variations are examined. The researcher not only looked for themes and patterns but also for irregularities in order to sort the data from the interviews and the observations in a meaningful way. This was done to narrow down the principal themes, grouping the interviewees' responses into categories with similar ideas, concepts and themes (Rubin and Rubin, 1995, p.238). This approach is in line with the

six phases of thematic analysis described by Braun and Clarke (2006), set out in Table 3.1.

Table 3-1 Phases of Thematic Analysis

Phase	Description of the process
Familiarising yourself with your data:	Transcribing data (if necessary), reading and re-reading the data, noting down initial ideas.
Generating initial codes:	Coding interesting features of the data in a systematic fashion across the entire dataset, collating data relevant to each code.
Searching for themes:	Collating codes into potential themes, gathering all data relevant to each potential theme.
Reviewing themes:	Checking that the themes work in relation to the coded extracts (Level 1) and the entire dataset (Level 2), generating a thematic 'map' of the analysis.
Defining and naming themes:	Ongoing analysis to refine the specifics of each theme, and the overall story the analysis tells; generating clear definitions and names for each theme.
Producing the report:	The final opportunity for analysis. Selection of vivid, compelling extract examples, final analysis of the selected extracts, relating back of the analysis to the research question and literature, producing a scholarly report of the analysis.

(Braun and Clarke, 2006, p.95)

The coding process then followed Saldaña's (2013, p.58) recommendation to progress in two cycles.

3.4.2.1 The First Cycle of the Coding Process

In the first cycle of the coding process, holistic coding was applied. 'To see what is there', the transcribed text is 'chunked into broad topics' (Bazeley, 2007, p.67). Holistic coding is a preparatory approach to a unit of data before a more detailed coding or categorisation takes place. It is

useful when a general idea exists of what to investigate in the data. Furthermore, holistic coding is a time-saving method for large amounts of data. It works well with thematic analysis and is used to identify basic themes in the data by absorbing them as a whole, instead of analysing them line by line (Dey, 1993, p.104). Through first-cycle holistic coding, 33 initial codes were created. These are shown in Appendix 6. These initial codes then led to preliminary results. The emerging broad themes were:

- Older passengers have few expectations of this part of the holiday
- The current passenger processes and offered services are sufficient
- The airport is a public infrastructure/means to an end
- Commercialisation drives management decisions

These broad themes allowed for a first understanding of the actual service experience of the older leisure traveller within the regular passenger process. An initial picture emerged of the experience of today's older passengers and how management deals with them.

3.4.2.2 The Second Cycle of the Coding Process

In the second cycle of the coding process, pattern coding was applied. This grouped the initial codes together, narrowed down the themes and formed the basis for the structure of the empirical results. Pattern coding developed category labels that identified similarly coded data and led to the development of themes. According to Miles et al. (2014, p.86), pattern codes are 'explanatory or inferential codes, ones that identify an emergent theme, configurations, or explanations'. Through the second cycle, the 33 initial codes of the first round were put 'into more meaningful and parsimonious units of analysis' (Miles et al., 2014, p.86). Pattern coding resulted in 20 categories. These are shown in Appendix 7. They were then grouped into three themes, not ranked by order of importance, that describe the airport experience of the older leisure traveller:

- The characteristics of the older leisure traveller
- The treatment of older leisure travellers within the regular passenger process
- How management is dealing with the older passenger

Appendix 8 provides a sample (Passenger13) of how a theme was developed from interview data in line with the two-cycle coding process.

3.4.3 Data Quality and Validation

Some concerns about validity, reliability and generalisation arise with the chosen methods. Subjectivity and personal views can influence the interpretation of data (Miles and Huberman, 1994). Interviews and observations can be regarded as a potential source of misunderstandings and bias. The single case study approach is often criticised for its lack of objectivity and representativeness (Gummesson, 2000, pp.221-222). Three basic principles can be used to judge data quality. The results of research work are considered

> [v]alid if the explanations are really true or accurate and correctly capture what is actually happening. Reliable if the results are consistent across repeated investigations in different circumstances with different investigators. Generalizable if they are true for a wide (but specified) range of circumstances beyond those studied in the particular research (Gibbs, 2008, p.91).

Out of the total of 35 interviews with older passengers, only one interview was conducted with an English-speaking person. All other interviews took place with German-speaking leisure travellers. Similarly, out of the 50 observations, only three dealt with non-speaking German travellers. Furthermore, the travellers' age was estimated on the basis of their physical appearance alone. Despite these possible limitations on generalisability, the older German-speaking leisure travellers and their travel behaviour can be used as a reference for how older passengers

are treated at international airports. Airports of a similar scale and service level have many similarities when it comes to dealing with passengers. The characteristics of their full service provision are complex but comparable because airport passenger processes are highly standardised around the world. Thus, the single case setting at Frankfurt Airport provided a robust and rich dataset.

Creswell (2003) proposes that reliability and generalisability play a minor role in qualitative enquiry. According to him, the qualitative case study approach is critiqued for two other points, namely the gap between people's statements and actions, and the assumption that the context is stable and reactions remain the same (Creswell, 2003, p.195). This first point of criticism also turned out to be an issue over the course of the interviews in the present study, but the observations helped to gain clarification. The combination of the two methods minimised the gap between what people said and what they did. Creswell's second point of criticism was also taken into consideration but did not turn out to be a major obstacle. It was acknowledged that the airport environment is per se not stable and situations change; variables are not controllable within the given setting.

To extend, validate and verify data quality, the research combines various data sources and methods to show that similar results can be achieved. Data quality is thus be enhanced. First, the data collected from observations served to complement the interview data to strengthen the validity and quality of the emerging themes (Yin, 2014). Potential bias from the interviews was thereby minimised (Eisenhardt, 1991). Second, secondary information sources complement the field data. While that background information drew mostly from quantitative sources, the intended purpose was not to make the data more objective (Alvesson and Deetz, 2007, p.80). Statistics are cited to enable the reader to gain a more comprehensive understanding of the research setting, thereby increasing its overall quality.

Despite these taken measures, data quality was subject to some limitations. Those can be minimised by further investigations. Future research can use a wider quantitative survey to complement the in-depth qualitative findings of this work. A larger, more random sample would then allow for additional reliable identification of common traits within the segment of older people. For example, a telephone survey could be conducted to determine what older people think about the airport experience. This telephone survey could also be used to assess the reasons why people stop flying, and to explore the role of the airport in this decision process further. Together with the collected interview and observational data, the results would provide for an extensive array of demographic and lifestyles traits as well as reasons for flying. Thus, this combination of a quantitative with a qualitative approach would contribute to the development of a holistic model of customer behavior of older air passengers and non-air passengers. It would also identify market opportunities for management further.

3.5 Conclusion

This chapter has described how the research generated phenomenological findings from a single case. Qualitative research in the form of semi-structured interviews and non-participatory observations emerged as the most appropriate method to investigate the three main research questions. The case study gave an enhanced understanding of the service experience at the airport. To address the multidisciplinary nature of tourism transport (Page, 1994, p.6), the research was designed to gain a comprehensive understanding of the airport experience.

All decisions on research design and methodology were guided by this multidisciplinarity. The methods for data collection and analysis were chosen accordingly. The combination of interview and observational data provided the rich dataset required. The different sources provided various

perspectives. They provided for the necessary depth of insight while taking all complex relationships into account.

The chapter has shown that a certain amount of prejudice exists with regard to qualitative methodology and the single case study. Although Beverland and Lindgreen (2010, p.61) point out that research quality in qualitative cases has improved, there are still limitations to the chosen approach. The inductive approach of this research did not lead to generalisations; it led to contextual findings. Further research in tourism, air transport and ageing is necessary to investigate whether the findings of this single case study can be transferred to other settings.

4. THE CASE CONTEXT

4.1 Introduction

This chapter aims to provide a better understanding of the research context. It serves to introduce the reader to the manifold issues facing a major international airport and its passengers. It allows the unfamiliar reader to gain insight into the factors that influence, directly or indirectly, today's air transport system. While this context chapter draws from a variety of sources, the objective is to highlight the themes on the demand and the supply side that are relevant to the airport experience of older people.

The chapter proceeds with a description of the increase in air travel. It shows that flying is a growth market, largely due to the increase in leisure activities. Section 4.3 then provides some general background information on the case's specific setting at Frankfurt Airport (FRA). Quantitative data is presented to gain an understanding of the airport's traffic and passenger structures. Different approaches to segment an airport's customer base exist. These are explored before the discussion turns to the age distribution of passengers at FRA.

At the core of an airport's service offering is the passenger process. Passenger services with commercial and non-commercial elements contribute to this process and account for the service experience. The particular service offering for passengers with reduced mobility is described. A service campaign and a research project, the so-called PASS project, are highlighted, as both are of relevance to this research. These descriptions enable the reader to understand how older passengers are treated when they travel through the terminal.

Section 4.4 then takes a closer look at the airport operator, Fraport AG Frankfurt Airport Services Worldwide, its history and organisation. It

examines the possible impact of population ageing on its main business segments. Fraport's strategy is investigated with a focus on service delivery, passenger satisfaction and value creation. The chapter concludes with a summary of the main findings that emerge from the description of the case context.

4.2 The Increase in Air Travel

Tourism creates demand for leisure traffic and with that for air transport services (Papatheodorou and Lei, 2006, p.47). Regardless of the airlines' business models (scheduled, charter or low-cost), demand for air transport services is to a large extent derived from tourism activities. Like accommodation (Oh et al., 2007, p.120), air travel can be regarded as an extension of tourism activities. Liberalisation of the air transport market has stimulated tourism all over the world. Air travel's overall economic impact has grown. The International Air Transport Association (2014) summarises this long-term trend.

> International air transport grew at double-digit rates from its earliest post-1945 days until the first oil crisis in 1973. Much of the impetus for this growth came from technical innovation. The introduction of turbo-propeller aircraft in the early 1950s, transatlantic jets in 1958, wide-bodied aircraft and high by-pass engines in 1970 and later, advanced avionics were the main innovations. They brought higher speeds, greater size, and better unit cost control and, as a result, lower real fares and rates. Combined with increased real incomes and more leisure time, the effect was *an explosion in demand for air travel*.

The year 2010 saw a return to economic growth for the air transport industry, which has always been subject to short-term fluctuations around long-term growth. Despite the oil crisis, the Gulf war, Chernobyl, problems in Asia (like SARS and bird flu), the terrorist attacks of 9/11 and more recently the financial crisis, worldwide air passenger numbers still show a long-term upward trend. Because they have different business

models, airlines feel the impact of these cyclical difficulties to a larger degree than the airports. For example, airline ticket prices may be lowered, especially for business class, in times of economic hardship. However, for the airport the revenue from the landing fees is relatively stable regardless of whether the aircraft is full or half empty.

Nonetheless, for both airlines and airports, the need to develop new aeronautical and non-aeronautical sources of revenue is always present. With a net profit margin of only 0.5 per cent (Oxford Economics, 2010, p.5) the overall air transport industry's viability is constantly under review, not to say in danger. However, the general numbers of air passengers are on the rise. Table 4.1 sets out the development in passenger traffic since 1994.

Table 4-1 Air Transport, Passengers Carried 1994 to 2014

Year	Passengers Carried Worldwide	Year-on-Year Growth (per cent)
1994	8,013,077,224	8.2 (over 1993)
1995	8,475,385,885	5.8
1996	9,063,651,324	6.9
1997	9,495,296,952	4.8
1998	9,588,473,880	1.0
1999	10,194,620,596	6.3
2000	10,923,173,582	7.1
2001	10,828,439,154	-0.9
2002	10,656,610,565	-1.6
2003	10,966,840,969	2.9
2004	12,436,857,901	13.4
2005	13,005,516,310	4.6
2006	13,722,767,426	5.5
2007	14,658,979,853	6.8
2008	14,684,231,659	0.2
2009	14,980,401,207	2.0
2010	17,497,851,075	16.8
2011	18,593,373,913	6.3
2012	19,345,065,532	4.0
2013	20,403,615,466	5.5
2014	21,493,567,867	5.3

(The World Bank Group, 2015)

Appold and Kasarda (2013, p.1244) note that airports 'may be the busiest public spaces in many metropolitan areas'. This underlines the important role they play in society. Table 4.2 shows how busy the world's airport terminals are. It shows the passenger traffic that is handled by the world's top 30 largest airports.

Table 4-2 Passenger Traffic 2013/ 2012

	City (Airport)	Passengers 2013*	Passengers 2012*	Change (per cent)
1	ATLANTA GA, US (ATL)	94,431,224	95,513,828	-1.1
2	BEIJING, CN (PEK)	83,712,355	81,929,359	2.2
3	LONDON, GB (LHR)	72,368,061	70,038,804	3.3
4	TOKYO, JP (HND)	68,906,509	66,795,178	3.2
5	CHICAGO IL, US (ORD)	66,777,161	66,629,600	0.2
6	LOS ANGELES CA, US (LAX)	66,667,619	63,688,121	4.7
7	DUBAI, AE (DXB)	66,431,533	57,684,550	15.2
8	PARIS, FR (CDG)	62,052,917	61,611,934	0.7
9	DALLAS/F.W.,US (DFW)	60,470,507	58,620,160	3.2
10	JAKARTA, ID (CGK)	60,137,347	57,772,864	4.1
11	HONG KONG, HK (HKG)	59,588,081	56,061,595	6.3
12	FRANKFURT, DE (FRA)	58,036,948	57,520,001	0.9
13	SINGAPORE, SG (SIN)	53,726,087	51,181,804	5.0
14	AMSTERDAM, NL (AMS)	52,569,200	51,035,590	3.0
15	DENVER CO, US (DEN)	52,556,359	53,156,278	-1.1
16	GUANGZHOU, CN (CAN)	52,450,262	48,309,410	8.6
17	BANGKOK, TH (BKK)	51,363,451	53,002,328	-3.1
18	ISTANBUL, TR (IST)	51,304,654	45,123,758	13.7
19	NEW YORK NY, US (JFK)	50,423,765	49,291,765	2.3
20	KUALA LUMPUR, MY (KUL)	47,498,127	39,887,866	19.1
21	SHANGHAI, CN (PVG)	47,189,849	44,880,164	5.1
22	SAN FRANCISCO, US (SFO)	44,945,760	44,399,885	1.2
23	CHARLOTTE NC, US (CLT)	43,457,471	41,228,372	5.4
24	INCHEON, KR (ICN)	41,679,758	39,154,375	6.4
25	LAS VEGAS NV, US (LAS)	40,933,037	40,799,830	0.3
26	MIAMI FL, US (MIA)	40,562,948	39,467,444	2.8
27	PHOENIX AZ, US (PHX)	40,341,614	40,448,932	-0.3

28	HOUSTON TX, US (IAH)	39,799,414	39,891,444	-0.2
29	MADRID, ES (MAD)	39,717,850	45,176,978	-12.1
30	OSAKA, JP (KIX)	38,672,644	38,360,604	0.8

*Total Passengers Enplaned and Deplaned, Passengers in Transit Counted Once

(Airports Council International Europe, 2013)

North American airports always have handled a high volume of air passengers. Hartsfield-Jackson Atlanta International Airport (ATL) is the busiest airport in the world. In Europe, London Heathrow (LHR) ranks third in the world, with more than 70 million passengers annually, followed by Paris Charles de Gaulle (CDG), with just over 60 million, and Frankfurt (FRA), with 58 million passengers is twelfth in 2013. Dubai (DXB) and Istanbul (IST) show double-digit growth rates. With 19.3 per cent, the airport in Kuala Lumpur (KUL) has the highest growth rate. Madrid (MAD) has the highest decline rate with 12.1 per cent.

The Airports Commission (2013), an independent commission that reports to the Department for Transport in the United Kingdom, identifies two major trends in global aviation that influence passenger traffic and capacity growth in certain regions and at particular airports. Firstly, airline consolidation, the formation of three global alliances, namely Star Alliance, Skyteam and oneworld Alliance, has led to global route networks. These alliances concentrate their traffic on major airport hubs. Secondly, new competitors with new business models (in particular low-cost airlines) continue to challenge American and European national carriers. Asian and Middle Eastern airlines create new passenger flows that attract traffic away from the established aviation hubs, where a number of problems have started to emerge, such as constraints on airport expansion projects. The long-established aviation industry is increasingly under pressure from airport hubs in Eastern Europe and the Middle East. Furthermore, secondary airports - which, due to subsidies, are able to offer lower charges - are becoming more attractive to some airlines than they used to be (Forsyth, 2007, p.49). Competition is gaining

in momentum accordingly - not only between airlines and airline groups but also between airports.

The sections that follow now elaborate upon the impact of these developments on Frankfurt Airport.

4.3 Frankfurt Airport

Founded in 1924, under the name Südwestdeutsche Luftverkehrs AG, the airport started operations at the Rebstock site in Frankfurt, in the German state of Hesse. With the foundation of the Deutsche Luft Hansa in 1926 and growing demand for adequate infrastructure, this site became too small. As a result, in July 1936, the Frankfurt Rhein-Main Airport and Airship Base was officially opened. The new site was not only ideally located in Central Europe, in the middle of Germany, but was also adjacent to the Frankfurter Kreuz autobahn intersection (Fraport AG, 2013a).

A new major terminal of the airport, Terminal 1, was opened in 1972. To accommodate rising demand, it has expanded over the years. In 1984, Runway West opened. In 1992, the airport handled about 30 million passengers annually. By 1998, this number had risen to 43 million. The increase in passengers and freight resulted in further expansions in the 1990s. Terminal 2 opened in 1994 (Nordmeyer, 2000-2007). In June 2001, Fraport AG (formerly Flughafen Frankfurt/Main AG) was listed on the stock exchange. Meanwhile, the airport operator has become active in airport management business on an international level. It is one of the largest airport groups worldwide. Frankfurt Airport primarily serves the member airlines of the Star Alliance as their European hub airport.

Frankfurt Airport enjoys a good reputation because of its fast transfer times, reliable baggage conveyor system and intermodal connections that bring the different modes of air, rail and road transportation together.

The airport is ‘increasingly evolving into Frankfurt Airport City, an attractive business location and globally connected urban centre’ (Fraport AG, 2013a). As a sign of its economic impact, Frankfurt Airport accounts directly and indirectly for more than 100,000 jobs. It is Germany’s largest employment complex at a single location. More than 500 companies are based at FRA (Fraport AG, 2013b). The effect of passenger and cargo traffic on the region and the German economy is significant.

With increasing globalisation, Frankfurt Airport is often referred to as the ‘Gateway to the World for Hesse and Germany’ to underline its importance not only within the German aviation industry but also for industry and commerce in general. Future growth of the airport is supported by governmental institutions, as the airport acts as a facilitator not only for Hessian but also German export and economic well-being. However, this increasing demand for air transport creates problems at Frankfurt Airport, as the limited terminal facilities and runway space restrict its overall capacity. The increase in demand puts pressure on the airport’s facilities. Both of its terminals become more congested, especially as a result of the increased need for additional security facilities that have been introduces since 9/11 (Forsyth, 2007, p.51). Section 4.4 elaborates upon these problems.

Thus, at FRA passenger growth has been restricted but with the opening of a third runway in 2011, slot capacity has increased. Instead of 83 take-offs and landings per hour, the airport can now accommodate up to 126. A new pier was built in 2012, extending Terminal 1 westward and providing additional space for four Airbus A380 parking positions. The two existing terminals at FRA (Terminal 1 and Terminal 2) are forecast soon to reach their capacity limit (68 million passengers). The building of a new Terminal 3 was approved in 2015. Passenger comfort and service quality are both likely to be affected. Like other airports, Frankfurt Airport faces the challenge of developing into a proper and efficient public

infrastructure service provider that caters to the varying needs of all its stakeholders. Graham (2014, p.307) sums up the tasks:

> [T]he challenge is *how to maintain economic and social benefits* from air transport, encourage economic development through mobility, and yet respond to the increasing environmental pressures being placed on the industry.

Thus, the airport has to balance economic with social responsibilities. In the sections that follow, the role of airports as enablers of mobility are described in detail.

4.3.1 Europe's Main Airports and their Hub Operations

An airport that operates as a hub provides a transfer point for airline passengers. This is commonly referred to as a hub and spoke operation. Instead of offering non-stop, point-to-point services, airlines ask their customers to change aircraft at the hub, on their way to their final destination. Airports are also classified as large, medium, small, and non-hubs, depending on the volume of their passenger traffic. All major airports in Europe operate as large hub airports. In the case of Frankfurt Airport, competition is intense with London Heathrow, Madrid Barajas (both oneworld Alliance hubs), Paris Charles de Gaulle, Amsterdam Schiphol (Skyteam hubs) and Istanbul Ataturk (Star Alliance hub). Airline alliances continue to bundle traffic at these major international airports. Table 4.3 provides the ranking of European airports in terms of their passenger volume and year-on-year growth rate.

Table 4-3 Ranking of European Airports in 2014

Rank	City	Airport	Passengers (in millions)	Year-on-Year Growth (per cent)
1.	London	LHR	73.4	1.4
2.	Paris	CDG	63.8	2.8
3.	Frankfurt	FRA	59.6	2.6
4.	Istanbul	IST	56.8	10.7
5.	Amsterdam	AMS	55.0	4.6
6.	Madrid	MAD	41.8	5.3
7.	Munich	MUC	39.7	2.7
8.	Rome	FCO	38.5	6.5
9.	London	LGW	38.1	7.5
10.	Barcelona	BCN	37.5	6.7

(Fraport AG, Markt- und Trendforschung, UEW-MF, 2015a)

In 2014, London Heathrow (LHR) was Europe's busiest airport, with more than 73 million passengers. Notably, Istanbul showed an increase of 10.7 per cent in 2014 over the previous year. FRA handled almost 60 million passengers, an increase of 2.6 per cent.

The primary benchmark group for Frankfurt consists of the airports in Amsterdam (AMS), Munich (MUC), Paris (CDG) and London (LHR). A consultancy study (Kiani-Kreß, 2009) sums up the performance of FRA within this primary benchmark group. The study observes that while these airports may be leaders in revenue generation and functionality, they lack customer friendliness. The majority cannot be classified as 'world class'. The findings of that study are summarised in Table 4.4. The assessment is based upon grading, where 1 is 'very good' and 6 is 'unsatisfactory'. The total score is a composition of an airport's economic performance, its sustainability and service criteria (broken down into soft and hard factors).

Table 4-4 A Comparison of the Performance of European Airports in 2010

Criteria	Score (per cent)	AMS	FRA	MUC	CDG	LHR
Economic Performance	40	2.03	2.19	2,.78	2.05	2.45
Handling/Landing Charges	8	2.3	1.0	2.3	2.5	2.0
Retail	7	2.1	3.4	2.0	1.6	2.6
Real Estate/Subsidiaries	6	3.3	1.7	3.7	2.7	3.3
Finances	8	1.0	2.6	2.8	1.6	2.5
Costs	8	1.8	2.4	3.3	2.1	1.8
Infrastructure	3	2.0	2.0	3.0	1.7	3.3
Service	20	1.7	1.8	1.5	3.0	3.8
Hard Factors	*12*	*2.0*	*1.8*	*1.7*	*3.0*	*3.8*
Schedule	2	2	2	2	1	3
Punctuality	2	2	2	1	2	5
Transfer Time	2	1	2	1	5	5
Waiting Times	2	3	2	1	4	4
Baggage	2	3	2	2	4	4
Public Transport	2	1	1	3	2	2
Soft Factors	*8*	*1.3*	*1.8*	*1.3*	*3.0*	*2.8*
Atmosphere	2	2	2	1	3	3
Distances/Signage	2	1	1	1	2	2
Friendliness of Staff	2	1	2	2	3	3
Sustainability	40	2.02	2.18	2.28	2.26	2.99
Strength of Home Carrier	5	2.5	2.3	2.3	2.5	3.1
Strength of Airport	11	2.0	2.2	1.7	1.5	3.4
Innovation Strength	12	2.1	2.2	2.8	2.5	2.6
Sustainability	5	1.4	1.6	2	2.6	2.4
Political Framework	7	2.0	2.4	2.4	2.6	3.4
Total Score	100	1.96	2.11	2.32	2.33	2.85

(Adapted from Handelsblatt GmbH, 2011)

Out of a total score of 100 per cent, economic performance accounts for 40 per cent, sustainability for another 40 per cent and service only for 20 per cent. Within the service criteria, the authors differentiate between schedule, punctuality, transfer and waiting times, baggage and public transport as hard factors and atmosphere, distances, signage and staff

friendliness as soft factors. Frankfurt Airport comes in third place in the service ranking, after Amsterdam and Munich. It gets a 1.8 in both the hard and the soft factor service categories. The strength of the home carrier (i.e. Lufthansa) gains the highest score, with a 2.3 among the five airports. In total, Amsterdam's Schiphol airport is seen to be Europe's best and most future-oriented airport. Frankfurt and Munich come in second and third, closely followed by Paris Charles de Gaulle. It would have been interesting to see a breakdown of how different age brackets answer the questions about 'atmosphere', 'distances/signage' and 'friendliness of staff'. This need to develop performance measures at airports further is also stressed by Humphreys and Francis (2002, p.84).

4.3.2 Impact of Airline Alliances

All five airports in the benchmark group operate as hub airports. Airline alliances and their concentration of traffic drive developments at these airports. Passenger traffic today is driven by three main airline alliances, namely Star Alliance, Skyteam and oneworld Alliance. Those three dominate passenger flows. Lufthansa, Air Canada, South African Airways, Scandinavian Airlines System, United, Singapore and Turkish Airlines form Star Alliance. Delta Air Lines, KLM/Air France, Alitalia, Korean and Czech Airlines are the main airlines that make up Skyteam, while British Airways, Iberia, Finnair, Malev, American, Cathay and Japan Airlines are members of oneworld Alliance. The networks and hub structures of these three alliances have been expanded and concentrate at specific airports. To change flights between alliances as a passenger is possible but costly.

The range of services that are provided by hub airports can vary significantly. Ownership forms, funding, management structure and the environments they operate in also differ. Nonetheless, airports that want to enhance their competitiveness as hub airports for alliances need to ensure a high level of service quality in all their essential operational services, their handling services and their commercial activities. Forsyth

(2007, pp.45-52) points out that for future competitiveness, a strong home carrier or a strong alliance is no guarantee of good performance. With a growing demand on airport infrastructure due to new airline business models (e.g. low-cost operators) and new aircraft types (e.g. the Airbus A380), but also changes in the regulatory environment and ownership forms, an airport's cost efficiency increasingly gains in importance.

Frankfurt Airport is a hub airport for Lufthansa. Star Alliance is responsible for by far the biggest share of traffic at this airport, at 77 per cent (Fraport AG, Markt- und Trendforschung, UEW-MF, 2015b, p.75). Thus, Frankfurt Airport serves primarily the member airlines of the Star Alliance. Oneworld Alliance with six per cent and Skyteam with four per cent play a minor role. Airlines that are currently not interested in joining alliances do not play a significant role at Frankfurt. They concentrate on setting up their own intercontinental networks for traffic. As a result, airports in South Asia, South East Asia and the Persian Gulf gain in significance (Intraplan Consult GmbH, 2006, pp.108-109).

Within Central Europe, Star Alliance operates in and out of several hubs. Lufthansa concentrates on Frankfurt and Munich as its primary airport, with Copenhagen, Zurich and Vienna as its secondary hubs (Fraport AG, Markt- und Trendforschung, UEW-MF, 2015b, p.75).

Figure 4.1 sets out the main passenger shares by airlines at Frankfurt Airport in 2014.

Figure 4-1 Passenger Share by Airlines at Frankfurt Airport in 2014

Removed

(Adapted from Fraport AG, Markt- und Trendforschung, UEW-MF, 2015b, p.74)

Figure 4.1 emphasises that the largest share of traffic, namely 72.9 per cent, is generated by the member airlines of Star Alliance together with the two leisure carriers Condor and Air Berlin. Tuifly is another airline that mainly caters to holiday travellers at Frankfurt Airport. Together with Emirates, SAS, Singapore Airlines and Turkish Airlines, it forms the second largest group in terms of passengers share, but with only 14.8 per cent. The large share of these three German holiday airlines stresses that the demand for air transport for leisure purposes is high.

4.3.3 Passenger Traffic and Structure

In 2014, a total of 123 passenger airlines served Frankfurt Airport. Thirty-nine of these carriers were handled at Terminal 1, the other 84 at

Terminal 2 (Fraport AG, Markt- und Trendforschung, UEW-MF, 2015b, pp.71-72). The development of passenger numbers at Frankfurt Airport in the 10 years from 2004 is in line with the worldwide increase in air travel. Passenger totals at FRA increased by almost 10 million in that period, while the number of arriving and departing aircraft fell from 477,475 to 469,026 (Table 4.5).

Table 4-5 Passengers and Aircraft Movements at Frankfurt Airport 2004 to 2014

Year	Passengers		Aircraft Movements	
	Total	Δ%[1]	Total	Δ%²
2004	51,106,647	5.7	477,475	4.1
2005	52,230,323	2.2	490,147	2.7
2006	52,821,778	1.1	489,406	-0.2
2007	54,167,817	2.5	492,569	0.6
2008	53,472,915	-1.3	485,783	-1.4
2009	50,937,897	-4.7	463,111	-4.7
2010	53,013,771	4.1	464,432	0.3
2011	56,443,657	6.5	487,162	4.9
2012	57,527,251	1.9	482,242	-1.0
2013	58,042,554	0.9	472,692	-2.0
2014	59,571,802	2.6	469,026	-0.8

Δ%[1]Arriving, Departing and Transit, Change to Previous Year
Δ%²Arriving and Departing, Change to Previous Year

(Adapted from Fraport AG, Markt- und Trendforschung, UEW-MF, 2015b, p.16)

The decrease in aircraft movements did not affect the passenger volume negatively and forecasts see a steady growth in absolute passenger numbers. One study for the German Federal Ministry of Transport, Building and Urban Development (ITP/ BVU, 2007), for example, predicts an average increase in air travel in Germany of 3.5 per cent per annum up until 2025. This growth rate, however, is below the increase of 4.8 per

cent annually between the years 1992 and 2006. The 3.5 per cent growth rate would result in an overall increase of 108 per cent up to 2025 from 2004. Under this scenario, the 111 million air passengers whose origin or destination of travel is in Germany would then consist of 28.5 million private travellers, 40 million business travellers and 42.5 million leisure travellers (ITP/BVU, 2007, pp.135-136).

Table 4.6 allows for some insight into the ranking of the final destinations of passengers departing from Frankfurt Airport. Spain, the Canary Islands, Italy and Turkey feature strongly. They are all popular holiday destinations (Table 4.6).

Table 4-6 Departing Passengers and their Destinations in 2014

Removed

(Adapted from Fraport AG, Markt- und Trendforschung, UEW-MF, 2015b, p.28)

The passenger traffic mix in and out of Frankfurt Airport can also be broken down by regions. In 2013, European arrivals and departures dominated passenger traffic, followed by North America, the Far East and domestic traffic. These regions showed moderate growth rates. Passenger traffic from and to the Middle East, Africa and Australia had

decreased from the previous year (Fraport AG, Markt- und Trendforschung, UEW-MF, 2013, p.27).

4.3.4 Passenger Types

There are various approaches to segment an airport's customer base. A common standard is missing. While passenger numbers are reported, it is difficult to break down the passenger group by other characteristics. Freathy and O'Connell (2000, p.105) refer to them as an 'an eclectic array of individuals now passing through European airports' for whom it becomes increasingly difficult to offer better choice, service and value. Common segments include domestic, international and transit passengers, short versus medium and long haul, scheduled versus non-scheduled, business versus pleasure and intra-EU versus extra-EU (Freathy and O'Connell, 2000).

For Frankfurt Airport, country of residence has been reported as a differentiator. At FRA, the share of domestic and foreign travellers has remained relatively stable between 2004 and 2014. Domestic travellers account for 45 per cent and foreign travellers for 55 per cent (Fraport AG, Markt- und Trendforschung, MAR-MF, MSG-MV, MVG-MR, UEW-MF, 2004 to 2014).

Another differentiation can be made between business and private travellers. Especially for their retail offerings, airports are keen to distinguish between these two groups because their consumption patterns are likely to differ. Business travellers are characterised as less price-sensitive, as they are used to greater flexibility of the schedule, the ticket conditions and other amenities (e.g. cabin service, bonus miles, lounge access). However, Freathy (2004, p.194) describes business travellers as a challenge because - due to their high frequency of travel - they tend to spend less time and money on shopping.

The mix of business and private travellers at Frankfurt has changed over the years. While in 2004 50 per cent of all passengers were travelling on business, this number had gone down to 40 per cent in 2014. Private travel has grown in the meantime and accounted for 60 per cent in 2014. This again stresses the growing importance of the leisure travel segment (Fraport AG, Markt- und Trendforschung, UEW-MF, 2015c).

The needs and demands of individual passengers at FRA are highly heterogeneous (Müller, 2012, p.40). Between 2003 and 2011, Fraport Airport's reporting distinguished between the following passenger types: business traveller, leisure traveller, junior corporate, cosmopolitan traveller, premium customer and individualist. The respective shares of these groups by year are shown in Table 4.7.

Table 4-7 Passenger Types at Frankfurt Airport 2003 to 2011

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(Adapted from Fraport AG, Markt- und Trendforschung, MAR-MF, MSG-MV, MVG-MR, UEW-MF, 2003-2011)

The classification of passengers by these criteria stopped in 2011 because the passenger types were acknowledged to be too diverse to be grouped by six criteria only. Apart from 'Junior Corporate', older passengers were part of all five passenger types. A new classification system by marketing criteria has not been introduced since.

4.3.5 Age Distribution at the Airport

A study by Intraplan Consult GmbH (2006) highlights that certain age groups in German society display similar characteristics with regard to their holiday behaviour. However, the preferred mode of transport for leisure trips of the working and non-working population differs. Sixty-three per cent of the working population between the ages of 21 and 60 prefer to fly. This number goes down to 15 per cent for the same age group whose members are not working. When they turn 61 and approach retirement, only 15 per cent fly to a holiday destination. Other modes of transportation, like trains and busses, then gain in popularity, as set out in Table 4.8.

Table 4-8 Mode of Travel for a 'Leisure' Trip

	Share of German Population (per cent)	Air Transport (per cent)	Other Modes of Transportation over 100 km (per cent)
Age Group Up To 20 Years	21.6	7	14
21-60-Year-Old Working Population	42.8	63	49
21-60-Year-Old Non-Working Population	12.1	15	13
61 Years and Older	23.5	15	24

(Adapted from Intraplan Consult GmbH, 2006, p.7)

Frankfurt Airport segments its customer base according to age. Table 4.9 shows that age distribution within the passenger mix was relatively stable between 2005 and 2014. A significant demographic effect on passenger structures cannot be noticed. The proportion aged 60 years and older shifted only between 8 per cent and 7 per cent. In 2014, 58 per cent of all travellers who originated or passed through FRA were between 30 and 49 years old. Sixteen per cent were aged 50-59 years (Table 4.9).

Table 4-9 Age Distribution at Frankfurt Airport 2005 to 2014

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Age (years)	Share (per cent)									
0-29	21	20	21	20	22	20	21	21	21	19
30-39	29	29	29	27	28	28	28	26	27	30
40-49	26	27	27	27	27	28	26	26	26	28
50-59	16	16	16	18	16	17	18	19	18	16
60 and older	8	8	7	8	7	7	7	8	8	7

(Adapted from Fraport AG, Markt- und Trendforschung, MAR-MF, MSG-MV, MVG-MR, UEW-MF, 2004 to 2014)

The table suggests that the airport has not yet seen the effect of population ageing on its passenger structures, despite the anticipated growth in the number of older leisure travellers. However, due to rising passenger numbers (Table 4-5) and the overall positive development in air travel (Section 4.2), more older passengers - in absolute numbers - travel through Frankfurt Airport.

4.3.6 Passenger Services

Passenger services at Frankfurt Airport do not differ substantially from the operational processes, facilities and service offerings that can be found at other international hub airports. The range of these services is described in Section 2.5. Against this worldwide standardisation, however, Frankfurt Airport faces some problems due to its complex terminal infrastructure and layout. Airport users often criticise its processes and the state of the facilities.

4.3.6.1 Services for Passengers with Reduced Mobility

The description of the case setting is not complete without a description of the complimentary and non-complimentary service offerings that are in place for disabled passengers and others travelling with reduced mobility. Oder people account for high proportions of these two groups (World Health Organization, 2015). To enable mobility, accessible services have to be in place. These services for passengers with reduced mobility are part of the standard service provision at the airport.

In 2013, Frankfurt Airport recorded [*number removed*] passengers who asked for assistance. This was an increase of 8.6 per cent over 2012, when [*number removed*] passengers registered as passengers with reduced mobility (FraCareServices GmbH, 2015). On July 26, 2008, EU Regulation No. 1107/2006 came into effect, which states the rights of disabled passengers and passengers with reduced mobility when flying (Fraport AG, BVD-IE, 2008). These passengers are protected from discrimination and have a right to appropriate assistance to help them through all European Union airports. The airport has to promote equality and positive attitudes, their participation in public life has to be encouraged. Passengers who require assistance are asked to notify the airline or their travel agency in advance. Help points throughout both

terminals at Frankfurt were installed, where passengers can ask for immediate assistance.

From 2008 on, the provision of appropriate service offerings was no longer in the hands of the individual airlines. Their duties were transferred to the airport operators. At Frankfurt Airport, a joint subsidiary of Lufthansa and the airport operator, FraCareServices, was founded to provide a complimentary service for those in need. Non-complimentary services are also offered. In 2011, a new service concept under the name 'Easy-Check-in' was introduced by a private entrepreneur at FRA. For 15 euros, personal assistants were there to help passengers throughout the whole process, from arrival at the airport to the check-in counters and onto the boarding gates. The target group of this service were older passengers, families with children, persons travelling with much baggage and travellers who are overwhelmed and stressed by the airport environment (Fraport AG, KMA-KS, 2011). In 2012, the service was renamed 'Dr Joe's Welcome Service' and after a couple of months it went out of business. In 2015, the airport operator itself introduced a non-complimentary service called 'Check-in to Gate'. At a starting price of 85 euros, the airport operator offers to meet up to four passengers at check-in and help them through the airport and onto the aircraft (Touristik Aktuell, 2015).

4.3.6.2 The Service Innovation Campaign

To increase passengers' overall satisfaction, Frankfurt Airport launched a customer service initiative named 'Great to have you here' in 2010. For the long-term initiative, 10 million euros were allocated with the objective of improving the quality of the passenger experience. The initiative's main objective is to enhance FRA's international competitiveness by increasing passenger satisfaction with its services. The programme runs in cooperation with airlines, service providers, retail concessionaires and different authorities. It investigates the entire travel chain and identifies

check-in, security control and baggage drop-off as the crucial points of passenger contact. The service initiative is divided into four key projects. ‘Friendly and Attentive’ aims to offer support, assistance and guidance to passengers. The goal of the ‘Fast and Comfortable Travelling’ key project is to optimise transfer over the long walking distances passengers have to cover. The ‘Pleasant Ambience’ key project focuses on the improvement of the overall travel experience within the given infrastructure (lighting, colour design and choice of materials). Finally, ‘Shopping and Excitement’ works on improving the retail offering, services and entertainment. According to the initiative’s findings, 87 per cent of all passengers are under stress at airports (Fraport AG, 2010). The four projects aim to reduce these high levels of stress for all passenger groups. This is an objective which is of particular relevance to older travellers because they prefer a less stressful environment (Romsa and Blenman, 1989).

4.3.6.3 The PASS Project

Another initiative at Frankfurt Airport that is relevant to this work’s focus is the so-called PASS project. PASS stands for ‘Personalised assistance system and services for mobility in old age’. The Federal Government of Germany initiated this project, whose objective is to improve mobility in old age. It puts the focus on the design of intermodal interfaces within complex infrastructures such as airports and train stations. The overall goal of the initiative is to enable older passengers to stay mobile even if they have diminishing physical and cognitive capabilities, and to encourage them to travel (Fraport AG, UEW, Bitterer, 2011).

PASS covers the whole passenger journey and brings together the different service providers. It aims to make - via an application on a mobile device - various types of auxiliary information available to older passengers in order to ease their journey. The target group of the project are not only passengers with reduced mobility but also agile leisure

travellers who are keen on travelling after retirement (Bott, 2012, p.21). The project covers a range of topics, from the provision of help buttons along the journey to porter services, signage, medical and personalised services and shopping offers. The PASS project identifies the transport of luggage and spatial orientation as the main problems for older travellers. Together with Lufthansa, German Rail, REWE Touristik and the Seniorresearch Institute, the airport operator has decided to participate in this interdisciplinary initiative, if only to gain more insight into the older passenger segment (Fraport AG, UEW, Bitterer, 2011).

4.4 Fraport AG Frankfurt Airport Services Worldwide

This section provides some background information on the airport operator's political, economic and social environments. Fraport AG Frankfurt Airport Services Worldwide is among the leading organisations in the international airport business. It enjoys an international reputation because of its competence in managing airports. With its associated companies and subsidiaries, it engages in various forms of airport management and related airport services around the world. For example, Fraport has offered its expertise in ground handling services for years. It is also involved in privatisation projects worldwide, such as at the airports of Delhi, Cairo, Antalya, St Petersburg, Lima, Varna and Burgas and more recently Ljubljana. With FRA, it operates one of the world's most important air transport hubs. Fraport AG drives Frankfurt Airport's development as an airport city, which is described in marketing terms as:

> An outstanding real-estate location and gateway of mobility and excitement. In addition to covering the full range of airport services, Fraport AG is a competent partner in airport retailing and real-estate development. As a full-service provider in the airport management field, Fraport AG is active on four continents through investments and subsidiaries. In 2013, the Fraport Group generated €2.56 billion revenue and Group profits of €226 million (Fraport AG, 2014).

For years, the City of Frankfurt, the State of Hesse and the German government owned Frankfurt Airport. Under this ownership structure, the operator was regarded primarily as a public infrastructure provider. The optimisation of the service offering or the need to increase commercial activities played a minor role. This changed in 2001, when the newly formed Fraport AG, was Germany's first airport management company to be listed on the stock exchange. It offered shares to private and institutional investors. The goal of this initial public offering was mainly to gain access to additional funding, to ensure future growth. In 2015, the shareholder structure was: State of Hesse, 31.35 per cent; Stadtwerke Frankfurt am Main Holding GmbH, 20.02 per cent; Deutsche Lufthansa AG, 8.45 per cent; RARE Infrastructure Limited, 4.87 per cent; and 'unknown', 35.31 per cent. Individual and employee shares account for the latter (Fraport AG, Investor Relations, 2015).

Notably, Lufthansa holds a share in Frankfurt Airport. While airlines are involved in airports in other parts of the world (e.g. the United States of America or Australia), this is not very common in Europe. Birmingham Eurohub (partially financed by British Airways) and Munich Airport (Lufthansa teamed up with Munich Airport for the building of Terminal 2) are two other examples where airlines have taken over activities that had formerly been performed by the airport operators exclusively (Graham, 2014, p.56). From the airlines' perspective, this expansion of their business models has various benefits. It does allow them to gain insight into airport operations. The reasons why airport operators invite airlines to engage in their core business can be speculated upon. They may want to tie them to their airports, intensify their partnerships or jointly optimise their processes.

Frankfurt Airport is situated in central Germany, in Hesse. The State of Hesse was, at the time of writing, governed by a coalition between the Christian Democratic Union and the Green Party. The debate about the airport's future expansion to create additional capacity had been prominent in a recent election campaign. Opposing, sometimes radical

views collided. The opponents of airport expansion argued that the monopolistic positioning of FRA within Germany's airport infrastructure had encouraged strategies that downplayed or wholly ignored the interests of some stakeholders. Operational restrictions, noise abatement and the investment in the construction of an additional terminal building (Terminal 3) led to a proposal for a new runway, but it faced many obstacles. In 2019/2020, Terminal 3 is planned to start operations with a passenger capacity of 25 million (Fraport AG, 2013a).

Operational processes and flight approaches are constantly reviewed, to allow for efficient operations and minimisation of noise. A night ban (between 23.00 and 05.00) on operations is in place. What effects these operational limitations will have on the airport's future competitiveness remains to be seen.

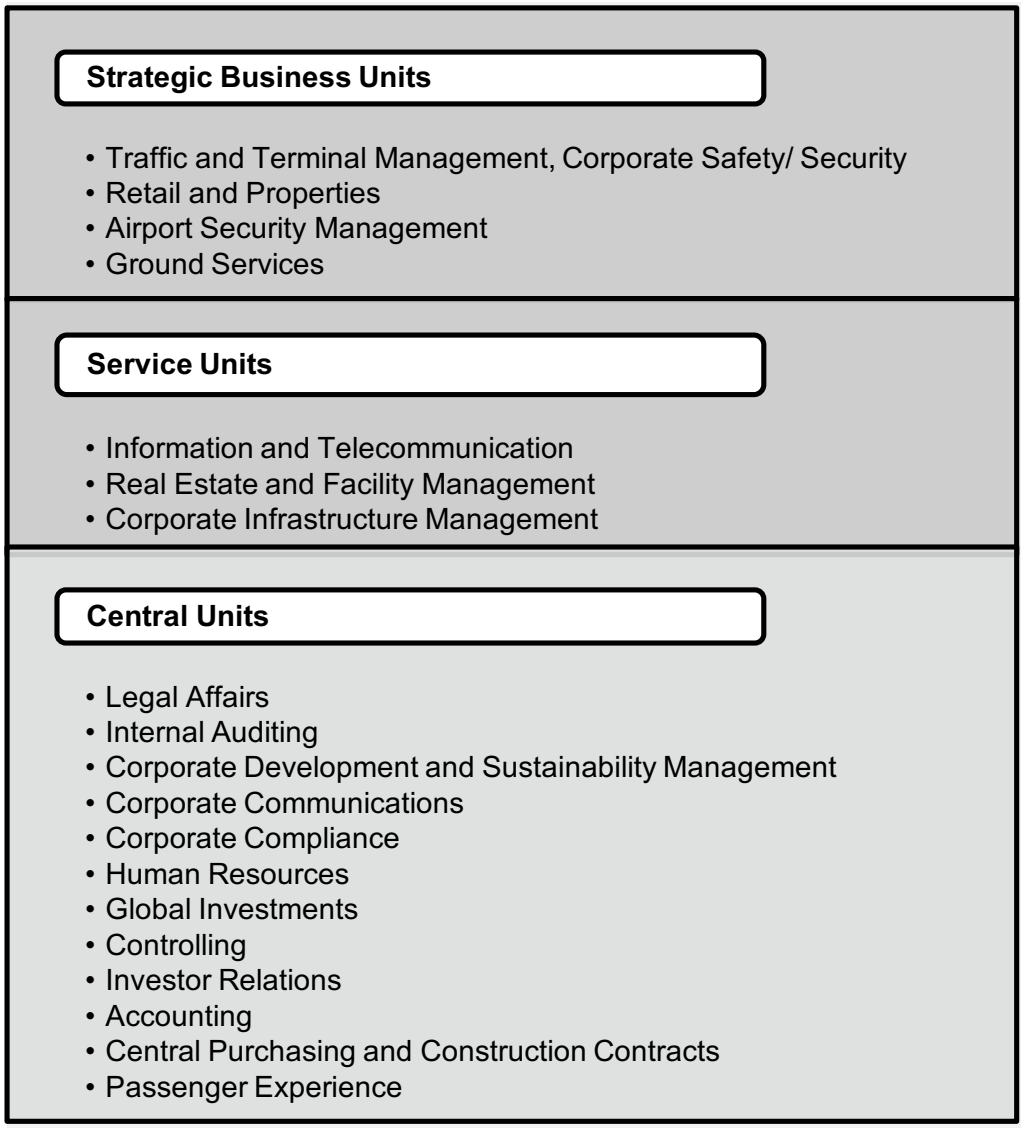
This discussion, however, makes clear that the airport operator does not only cater to those stakeholders that seek a return on their investment. In times of corporate social responsibility, the interests of various customer groups and surrounding communities have also to be taken into consideration. No evidence was found that getting the airport ready for an ageing population is part of the political and social debate. This suggests that the call by the World Health Organization (Section 2.6.7) for the creation of 'age-friendly environments' (2015, p.5) did go out to cities in general but not to 'airport cities'.

4.4.1 Fraport's Organisation

Fraport's executive board holds responsibility for four areas: retail and real estate; ground handling; aviation; and external activities and services. Fraport's organisational structure consists of four strategic business units, which generate the majority of revenues, three service units and 12 central units (Figure 4.2). The airport operator states that this organisation 'ensures optimum customer orientation and a high level of flexibility' (Fraport AG, UEW-OE, 2011). The service units carry out

service and support functions for the business divisions, while the central units are in charge of intra-departmental central functions.

Figure 4-2 Fraport's Organisational Structure



(Adapted from Fraport AG, Markt- und Trendforschung, UEW-OE, 2011)

Sustainability Management, that may address the corporate social responsibility dimension of an ageing customer base, operates in combination with corporate development. Notably, the central unit 'Passenger Experience' reports within the Ground Handling division to the Executive Director of Operations and is not part of the aviation

segment, which is responsible for Traffic and Terminal Management, which reports to the Chairperson of the Executive Board.

4.4.2 Impact of Ageing on the Main Business Units

Traffic and Terminal Management, Retail and Properties and Ground Services are most likely to be impacted by an ageing customer base. As the absolute number of older passengers increases, these units will have to satisfy the needs of this group.

In particular, Traffic and Terminal Management, which is responsible for the core passenger services, is asked to design appropriate, age-adequate services. Retail and Properties may also be asked to work on accommodating the different demands of the older passengers (e.g. medical services, personal assistance). Finally, Ground Services is increasingly impacted in its operational processes. The following analysis identifies the areas the three units may have to concentrate on in order to improve older people's service experience at FRA.

Bott (2012, p.45) explains that measures that cater to older passengers can be divided into general measures and those that are part of the terminal operations. All three strategic business units will have to design an airport that caters to older passengers (Table 4.10).

Table 4-10 Possible Measures for an Airport to Cater to Older Passengers

Measures	Needs for Adjustments		
	Traffic and Terminal Management	Retail and Properties	Ground Services
General Measures			
Seamless Information		x	x
Cooperation with Travel Agents and Tour Operators			x
Holistic Design, Varying Colours. Recognition of Signage	x	x	x
Marketing/Target Marketing	x	x	x
Personal Component/ Care Throughout the Whole Journey	x	x	x
Expansion of Parking Spaces and Distinct Marking	x	x	
Measures Relating to Terminal Operations			
Signage/Way-Finding	x	x	x
Signs (Elevators, Walking Paths, Layout)	x		x
Number of Personal Contacts	x		
Number of Elevators and Escalators	x		
Size of Elevators and Width of Escalators	x		
Acoustics of Announcements	x		
Appropriate Seating Capacity		x	x
Suitable Retail Offer (Shops and Food and Beverage), Personalised Offers	x		
Simplification of Service Offerings (e.g. Baggage Trolleys)		x	
Consistent Design/ Recognition of Signage			x

(Adapted from Bott, 2012, p.45)

4.4.3 Fraport's Strategy and Goals

To gain a fuller understanding of the factors that influence the older traveller's experience, a look was taken at Fraport's strategy. The airport operator's strategy is formulated at the group level and then broken down for the different business units. The strategy and planning process can be described as 'top down'. The whole process is separated into a preparation phase followed by three core phases (strategic discussion, strategic planning and operative planning). At the end of each phase a discussion in the form of a conference with the Board of Directors takes place (Fraport AG, UEW and FCO, 2010, pp.9-16). Fraport's major three strategic goals that emerged from this process of strategy formulation are value creation, strong performance and sustainability (Figure 4.3).

Figure 4-3 Fraport's Strategic Goals

Value Creation
Our goal is to create sustained corporate value growth in all business segments. We generate above average financial returns in all our business segments. Therefore, we are among the top players in the industry in each segment. We strive to improve our financing capabilities and achieve a strong debt-service performance.
Strong Performance
Our integrated business model ensures superior services due to safe, efficient and high-quality processes. Our strong performance is reflected by both significant market share and customer satisfaction. Our goal is to improve this performance continuously.
Sustainability
As an employer and economic generator, we are conscious of our corporate responsibility for our employees, society and the environment. In managing our business, we focus on sustainability and ensure that our corporate activities conform to economic, ecological and social criteria.

(Fraport AG, 2004-2010a)

At this level, Fraport's strategy does not specify that enabling mobility for an ageing society is a priority. However, customer satisfaction and corporate responsibility towards society are mentioned. It acknowledges the role customer satisfaction plays for all its corporate units. They all benefit from greater customer satisfaction when travellers decide to use FRA. For the retail segment, 'relaxed and contented passengers are a basic requirement for fully utilizing FRA's retail potential' (Fraport AG, 2004-2010b). Thus, an increase in customer satisfaction is identified as a top challenge for the managerial and operational units. The airport operator aims to be among the top five airports worldwide ranked in terms of customer satisfaction (Fraport AG, 2004-2010c). Fraport's service innovation campaign 'Great to have you here' serves as the principal measure to improve passenger service quality (Section 4.3.6.2).

4.5 Summary of the Context

This context chapter elaborated upon the case environment and the various variables that impact the passenger experience at Frankfurt Airport. While long-term studies predict an increase in the number of older travellers, the share of older people has not yet increased accordingly at Frankfurt Airport. Between 2004 and 2014 the percentage of travellers aged 60 years or more remained relative stable at 7.8 per cent. Because of the increase in passenger traffic, however, the absolute number of older passengers passing through the airport grows. Given the group's increasing share in society (see Table 2.1) and their declared importance for the tourism industry, this is important. The forecasted ageing of German society and the demand for air transport and tourism lead to an increase in the number of older passengers.

The chapter has explained that Frankfurt Airport is among the top three airports in Europe in terms of passenger volume. It concentrates on traffic that is generated by airline alliances. FRA positions itself as a hub airport for Lufthansa and the Star Alliance. Holiday destinations out of Frankfurt

feature strongly. The days are gone when Fraport supplied only a public transport infrastructure. With privatisation and commercialisation, it has turned into a modern-day service provider to cater to domestic and foreign travellers alike. The comparison within FRA's benchmark group has shown that the airport is challenged to compete on soft and hard service components as well if it wants to defend its position as a premier hub airport within Europe that is profitable and attracts loyal users. There is little evidence, however, that Fraport competes with other airports on service. This is apart from its general commitment to increase customer satisfaction and the introduction of a service campaign.

Besides some commercial offerings and the service for passengers with reduced mobility by FraCareServices, little is offered to ease an older traveller's journey through the airport. How to support mobility in old age is not an issue for the airport operator. However, it participates in the PASS initiative to gain a better understanding of the older passenger. The airport operator's strategy puts an emphasis on value creation, strong performance and sustainability. All three are themes that impact the passenger's service experience, if not directly then at least indirectly.

5. DISCUSSION OF THE RESULTS ON THE DEMAND SIDE

5.1 Introduction to the Empirical Findings

The main purpose of this chapter and the next is to present and discuss the empirical findings of the data analysis. They build upon the themes that evolved from the first and second coding cycle. The focus is upon the findings from the interviews with frontline employees (Frontline), management (Manager) and the older leisure travellers (Passenger). Observations complement and explore this interview data.

The discussion reflects back to key aspects that were raised in the literature review. The two chapters are arranged in line with the three principal research questions. Chapter 5 examines the demand side, while Chapter 6 investigates the supply side. Thus, this chapter addresses the first two research questions:

- What is the airport passenger experience of older leisure travellers?

- Do older passengers need special treatment in an airport?

Chapter 6 addresses the third:

- How is airport management responding to older passengers?

5.2 The Airport Experience of the Older Leisure Traveller

This part describes central attributes of the airport experience of the older leisure traveller. It starts with a description of the older traveller by frontline employees, managers and older passengers themselves. Observations reflect upon their travel behaviour. Section 5.2.2 depicts how older leisure travellers want to be addressed throughout their journey at the airport. In Section 5.2.3, the different points of the service

encounter are elaborated upon. Section 5.2.4 concludes the first part of this chapter. It presents the research findings as they relate to the six key themes of the airport passenger experience in light of Sykes and Desai's (2009) model.

5.2.1 Who Are the Older Travellers?

The literature review has pointed out that little is known of older travellers (Cohen and Cohen, 2012, p.2186; Sedgley et al., 2011, pp.423-425). Despite representing a 'promising segment on account of size and potential' (Littrell, Paige and Song, 2004, p.349), older people are under-researched. Existing research emphasises the group's heterogeneity; commonalities are difficult to identify among them. The following findings examine the tourist profile of the older leisure traveller who passes through Frankfurt Airport. These illustrations serve to give a better understanding of the group's behaviour and characteristics.

At the beginning of the interviews, interviewees were asked whether travel behaviour changes when people get older. One passenger shares his personal impression:

> I think the age pyramid has clearly shifted to the right. And that's an experience that you can witness without having to consult the statistics. One boards a plane, one goes on a ship and one notes that actually *significantly many more elderly people*, pensioners, retirees spend their money that they have acquired, on travelling (Passenger11).

This passenger is aware of population ageing and reflects upon its effects on worldwide tourism travel. Research by Go and Moutinho (2005, p.317) confirms the subjective impression of this older traveller. They show that the demand for travel is anticipated to increase as a function of an ageing population. The statement is also in accordance with Graham's (2006, p.17) observation that - as the 'baby boomers of the 1950s' grow older - leisure travel in this segment has grown significantly.

This appeal of holidaymaking is summarised by a manager. She describes it as: '*A happening event* […], *it is still an event* and something they look forward to' (Manager2). Notably, the manager says that for older people it is 'still an event'. This implies that older people remember the glamourous days of air travel when flying was something special and extraordinary. This stands in contrast to the developments in European air transport. In particular, through the fast expansion in the low-cost segment, flying has become a commodity (see Section 2.6.1).

Another manager elaborates upon what leisure tourism means for older travellers:

> The freedom of movement, the radius, the range of motion is unique, limited, but the *desire for freedom, flying leisure tourism*, they still want to experience that. That gets very attractive in old age, more attractive every day (Manager6).

This statement emphasises the importance that mobility - as a form of self-realisation - plays for people in older age (Prebensen et al., 2003, p.416). The freedom to travel is a measure of older people's quality of life. The question of whether their travel frequency has changed, however, gets mixed responses from the interviewees. Seventeen interviewees state that they travel more; six say they travel less and twelve remark that their travel frequency has not changed at all. The answers range from 'if you are retired you are on holiday the whole year' (Passenger24) and 'it's always the same, always the same. Twice a year, I go on vacation' (Passenger16) to 'I do no longer feel the need to travel much. […] I have travelled extensively, but now it is not so important for me anymore' (Passenger25). The wide range of responses signals the group's diverse holiday behaviour. Stereotyping them is wrong.

Although Go and Moutinho (2005, p.317) expect demand for travel to increase due to the ageing of society, no conclusion can be drawn on what this specifically means for the situation at Frankfurt Airport. There is

some evidence, however, that population ageing has had an effect on the passenger mix travelling through FRA. The median age of leisure travellers who pass through Frankfurt Airport has increased, according to one manager:

> *Travel age has indeed shifted in recent years upwards*, you might have said earlier on that 60 plus and then you travel only in the immediate surroundings, land-based travel. *Today it is 70 plus, 65 plus, 70, and then it levels off as far as air travel is concerned. Then we no longer have the appropriate growth*. We still get passengers occasionally, so for example, the oldest passenger of the year 2011 was a 98-year-old who is a permanent resident of Spain. He flew to Moscow and has flown five times a year via Frankfurt. And this suggests an overall high frequency of travel. *He flew business class and was classified as a business traveller with his 98 years* (Manager12).

This statement shows that although older people may fly more than before, the number levels off at a certain point. Then they prefer to take other modes of transport or simply prefer to stay at home. The 98-year-old man represents an extreme example. The fact that this passenger is classified as a business traveller confirms that it is difficult to find quantitative data on older passengers. For reporting purposes, airports use different segmentation techniques. Table 4.9 has illustrated the age brackets that Frankfurt Airport reports on. For its external reporting, Frankfurt Airport primarily segments by the class of service the travellers are booked in. This differentiation is in line with the airlines' categorisation. With more business travellers sitting in economy class to reduce travel expenses and more leisure travellers sitting up front, this segmentation, however, is questionable. Thus, a valid statement about the absolute figures of people who are 60 years and older passing through the airport as part of their holidays and the age bracket they are in cannot be made (Manager12).

Another interview reveals a possible explanation for why the airport operator does not segment the group in detail by age. A senior manager acknowledges that ageing takes different forms; to stereotype the group's needs and demands based upon age only would be wrong.

> [W]e have decided against defining the elderly or senior citizens as a single target group. Because *all analysis has shown that age is no criterion.* The needs and opinions of older people, and we have conducted passenger surveys with them, show that they do not differ substantially from those of the younger people. There is always another aspect to it, an overarching motivator for the reasons that cause a person to travel (Manager10).

This stresses the heterogeneity of the group (e.g. Giereth, 2006; Greco, 1988; Hirschel, 2010) and confirms that some are as physically and mentally fit as much younger ones. A typical older person does not exist (The World Health Organization, 2015a, p.3). Age alone is not a valid criterion for segmentation in terms of holiday behaviour.

For some older leisure travellers, flying has lost its attraction. This contradicts Manager2's claim that it is 'still a happening event'. The 'charm, that special something' is gone, 'it is no longer something special', a passenger remarks. When asked how her travel experience has changed, she answers: 'With regard to flying, negatively. As far as the holiday itself is concerned, that is, the offer at the destination, positively' (Passenger23). Another passenger regards the experience at the airport as a means to an end: '*The airport does not provide me with a holiday feeling* in that sense', she says (Passenger16). These two statements indicate that the airport service encounter is regarded separately; it is not part of the overall holiday experience in the eyes of some travellers. This finding is confirmed by the following observation. It took place in front of passport control in Terminal 1.

> There were *long queues* at the passport control points and the man and the woman (estimated age over 75 years) had to wait for *10 minutes in the queue. The woman asked the man how they are doing on time*. The man told her 'not to worry - that they will be fine'. He said that 'passport control is the *necessary evil* but this *nightmare of an airport* will be forgotten as soon as they arrive in Malta'. He told her that 'the next time they will go to the *North Sea by car'* and that *'flying is just no fun anymore'* (Observation25).

The literature review has revealed that, in Europe, besides flying, alternative modes of transport like the car play an important role (Button, 2004, pp.16-17). Furthermore, when people turn 61 and approach retirement, only 15 per cent fly to go on holiday (Intraplan Consult GmbH, 2006, p.7). This observation makes clear that the air travel industry runs the risk of losing customers to other modes of transport if it does not manage to provide a satisfying, 'fun' experience as the man said. This is important as older travellers are progressively searching for fun and enjoyment (Major and McLeay, 2013, p.5). The airport needs to cater to those needs if it wants to keep them as its customers. The journey through the airport is not regarded as part of the overall holiday experience. The couple felt stressed waiting in the queue (Kirk, 2013, p.134), anxious about possibly missing their flight. The processes at the airport are a 'necessary evil' that has to be dealt with. The airport is a 'nightmare'. The holiday starts for them in their destination (Malta).

A common characteristic that evolved from the collected data is the increased popularity of organised travel as part of a group. This issue was raised by older travellers themselves and confirmed by a frontline employee:

> The motivation is certainly that, that many people are living alone, that they feel *more secure in a group*. If they are single, widowed maybe, they feel simply better off because they have someone to follow and the itinerary is simply set. And they are also hoping for *nice contacts* (Frontline11).

Social interactions become more important when people get older. 'Collective well-being and emotions' (Prebensen and Foss, 2011, p.64) enhance their holidays. This growing popularity of group travel was verified by an observation. The observation took place at Terminal 1, hall B, departure level, in front of an Airline3 group check-in counter.

> The guide was welcoming the leisure travellers (17 women and men, estimated age over 60 years) at the group check-in. He told them that they are all now going to check-in their bags with that 'nice lady from Airline3'. The guide was giving clear instructions on what to do next and one woman commented: 'I appreciate this so much; I wouldn't know what to do. I *just love to travel as part of a group*'. The tour guide continued to explain the procedure. When everybody has finished check-in, they will proceed together through the security and then to the gate. He concluded: 'Once we are *on the plane* to Rome, our *holiday begins*' (Observation27).

Kirk (2013, p.174) calls for more research on the effect of groups on the airport experience to gain a clear understanding of the importance of social interactions (i.e. travelling as part of a group). This observation shows that older travellers feel safe and less stressed when part of a group. Socialising with fellow passengers is of interest to them. This is a finding that also confirms work by Major and McLean (2013, p.12) who investigate the overseas package holiday experience of older travellers: they appreciate having a tour guide to rely upon on their way through the airport.

In particular, package tours that are accompanied by a medical doctor have become popular with older travellers, as interview data with travel agents shows (Frontline2, Frontline6 and Frontline11). As pointed out in Chapter 2, some holiday tour operators cater specifically to their emerging needs. They seize upon the 'Silver Market Phenomenon' and adjust their offerings accordingly (Kohlbacher et al., 2010, p.9). Mediplus is such a tour operator. A frontline employee explains its unique offering:

> Mediplus is now [one], for sure. This is now an example that we have added now to our range of travel packages that we offer. These are trips that are accompanied on certain dates by a medical doctor. [Uh] Especially in countries where the consultation of a doctor is sometimes necessary, as in North Africa and India and so on. This is certainly something that appeals more to elderly passengers (Frontline11).

The wish to have medical assistance with them challenges the general perception that older people are in better physical health than generations before. The question remains whether medical assistance is actually needed on these trips or if they are just looking for assurance that it is available in case something happens. Regardless of their motivation, there exists little evidence 'to suggest that older people are experiencing their later years in better health than their parents' (World Health Organization, 2015, p.2).

Older travellers look for the least stressful mode of transportation (Romsa and Blenman, 1989). The findings specify that group travel makes their holiday experience more enjoyable; they feel less stressed. Travelling through the airport on their own is described as confusing by some interviewees. The journey through the airport has become more physically and mentally demanding for them over the years and they feel intimidated by its processes. Older people need 'more rest, more time'; they need to concentrate more and cannot 'just rush through'. 'It was kind of easy, now that's a bit more difficult', was one passenger's summary (Passenger12). A frontline employee reflects upon the older travellers' augmented level of stress:

> The older guests or people are very excited. It is not a normal process to fly from A to B. This is partly unknown or not … and they are simply not as firm with it. And I would imagine that it is simply *stressful* (Frontline10).

Older travellers like to go to the gate early, to make sure that they are not going to miss their departure (Frontline8). This statement is confirmed by an observation that took place in Terminal 1, A gates, at an Airline5 flight departure for San Francisco:

> The gate area was empty. The flight gate had just been announced. The first ones to get there were the two men, estimated age over 70 years. They appeared to be less stressed when the staff arrived at the gate shortly after them. They went back to the staff at the boarding gate to re-confirm twice that they were in the correct space for their departure. After being reassured by the gate agent, they started eating their sandwiches, which they had brought with them, while they waited for the boarding to begin (Observation13).

To reduce their stress level, reassurance by staff and enough time are important for these two men. This confirms that older passengers feel time pressure in an airport, they are anxious to miss their flights (Lin and Chen, 2013, p.426). The two men expect the airport to fulfil its traditional role as an infrastructure provider. They want to board their flight. They are not interested in the airport's augmented product offering (Halpern and Graham, 2013, p.119). They brought their own sandwiches with them and decided not to make use of the commercial offerings in the gate area. This is important because research by Lin and Chen (2013, p.431) shows that only if the airport manages to improve the atmosphere in the terminals, reduce the levels of stress and uncertainty felt by older travellers, they can 'effectively convert travelers' "dwell time" into shopping time' and generate revenues with them.

At the same time, Graham et al. (2006, p.17) contends that travellers 'are increasingly expecting their holiday experience to be more personalised and more related to their individual life style and choice'. Data confirmed that this holds true in the context of this work. Frontline1 states that older passengers have become 'much more sophisticated' and 'demand service'. Another comments that:

> there is an extra effort necessary. Older passengers are awkward, depending on their age. They *need more response, more attention and they demand it just the same* […] so generally, and I'd say they are more wearisome (Frontline3).

This first section has introduced and highlighted some characteristics of older travellers who pass through Frankfurt Airport. These brief descriptions of their behaviour contribute to a better understanding of this group. The discussion of the findings now turns to how this older leisure traveller wants to be addressed on his or her journey through the airport.

5.2.2 How They Want to Be Addressed

According to Shaw (2008, p.39) there are sub-segments to the holidaymaking market. The older group is one of these sub-segments, and they want to be addressed appropriately. What is appropriate? First of all, the findings of this research show that older passengers do not want to be categorised as old. This is in line with research by Patterson and Pegg (2009, p.264) who observe that older people continually assess their subjective age as different from their chronological. A passenger proclaims: *'We, the old people, do not want to be considered old'* (Passenger7).

A clear distinction across all three interviewee groups is made between passengers who are still fit and mobile and those who are reduced in their mobility. Special assistance for older passengers is regarded as necessary only when physical disabilities start to show. If they are still physically fit, they want to have fun when they travel. When asked whether he thinks that passenger services at Frankfurt Airport are catering to older people, a passenger answers:

> I already belong to the older age group but *I do not feel like that*. I'd consider looking at this question more nuanced than someone who

> would have to travel with a handicap or perhaps should not go at all (Passenger10).

This self-perception is consistent with Henley Centre Headlight Vision's (2007, p.21) definition of the 'active senior tribe', according to which older travellers have a number of specific travel needs that depend upon their varying age-related physical conditions. The following observation took place at Terminal 2, hall D, in baggage reclaim:

> The couple (one woman and one man, estimated age over 75 years) was waiting at the baggage carousel for their suitcases. The older man was leaning against a wall while the woman waited close by the carousel with other passengers. She engaged a young man next to her in conversation. The older couple's two heavy-looking suitcases came out. The young man lifted them off the carousel for them. The woman helped the older man walking towards the exit and the young man dragged their two suitcases together with his own bag all the way to the exit. Outside, the couple was met by a woman and thanked the young man for his help (Observation5).

This observation shows that older people do not necessarily make use of the services that are available to them. Relying upon formal help signifies a loss in their independence to them. Although they are eligible for personal assistance to help them through the airport under EU Regulation No. 1107/2006 (Fraport AG, BVD-IE, 2008), the couple relied upon informal help from a fellow passenger. A frontline employee confirms that this behaviour holds true for many older leisure travellers. They count on informal help, available through a societal code of conduct: 'There is always someone helping them. Because everybody has a grand-mum, everybody has a mum or dad that is that age' (Frontline8).

All interviewees were asked whether older passengers prefer passenger services that are developed specifically for them, or that are customised for them, or that are age-neutral. The majority - across all three interviewee groups - speak in favour of age-neutral services. This finding

confirms research by Kohlbacher and Hang (2007). They conclude that older consumers prefer an inclusive and age-neutral approach to service offerings. This is an important finding that needs to be taken into consideration when designing passenger services at the airport. Segmentation based purely upon age is not wanted (Kohlbacher and Hang, 2007, p.18). It is wrong, however, to assume that as a result of the interest to participate in the regular process, that older people do not appreciate any kind of help that eases their journey through the terminal. Commercial and non-commercial components need to be incorporated into future design and not made obvious.

In the interviews, management argues that their services are offered in just such a neutral and inclusive manner. However, their service offering - driven by the need to generate revenues - is differentiated according to other factors, mainly the class of service (e.g. first or business class). A manager who works in product development for an airline explains.

> *Most of our propositions are age-neutral*. We found that not only with old passengers but with families as well that they do not want to be singled out. They want to be treated like everyone else. It is an instinct. And then there are passengers that through their status, the cabin they are travelling in, and frequent-flyer status, that want to be segregated but that is a different story. I don't think you want to be singled out or treated differently. So it is important to have ... to *address people's needs in a discrete way* (Manager9).

While the wish for age-neutral propositions is voiced by the older passengers themselves, the motivation for management to offer standardised services is another one. A standardised, technology-driven process not only leads to process optimisations but also reduces costs.

This age-neutral approach is reflected in Frankfurt Airport's service campaign called 'Great to have you here'.

> We have that service campaign ‘Great to have you here’ which tries to raise the standard of service here in Frankfurt. And that is age-neutral, in my opinion. It deals with such things [uh] as e-carts, rest areas, waiting areas, which are a bit friendlier, internet terminals, free wireless Internet access for the first 30 minutes (Manager4).

This section has drawn a contradicting picture of how older travellers want to be addressed when they travel. On the one side, the comments lead to the conclusion that passenger service offerings for older people have to take into consideration the group’s wish for an inclusive, discrete approach (Kohlbacher and Herstatt, 2008, p.23). Older passengers are interested in making use of the same service offerings as other passengers. They are not interested in being singled out when they travel. On the other side, however, it is important to acknowledge their limitations to participate in this regular process when their level of fitness declines.

5.2.3 Service Encounter at the Different Points of Contact

Interviewees were asked to rate the importance of different points of contact throughout their journey at the airport. Page (2005) identifies the following points as being of importance to passengers on their way to the aircraft: ‘speed of check-in, efficiency of passport control, customs clearance and security screening, luggage retrieval, availability of shops, duty-free goods and associated services, and a spacious and relaxed environment in which to wait prior to boarding the aircraft’ (Page, 2005, p.282). His work does not differentiate by passenger type or by age. To ask the older passengers in the first and second round of interviewing to rank these service points served two objectives. Firstly, it helped them to remember and picture some key points of their recent service encounter. Secondly, the ranking, with the help of a Likert scale, serves to gain insight into the significance that is attached to the different commercial and non-commercial features of the airport product (Halpern and Graham, 2013, p.119).

Older people attach the highest importance to the speed of check-in. Twenty-three interviewees out of a total of 25 older leisure travellers in the second and third rounds of interviews rate it as either ‘very important’ or ‘important’. They say that check-in is the most important contact point for them. They expect it to run ‘smoothly’ and that ‘you quickly get your boarding pass’ (Passenger13). Thus, a fast check-in process enhances the airport experience.

> Well, I think, a quick check-in process enriches definitely the airport feeling for each guest as well, especially for senior citizens and elderly guests, because no one enjoys standing in line (Manager5).

A frontline employee observes that older travellers ‘simply want to have a *good feeling* at the check-in. They’re not in a hurry, they are going on vacation’ (Frontline11). This questions airport management’s focus upon the reduction in waiting times at the processing contact points such as check-in, security and passport control. Queuing and processing time are not particularly important to passengers in general (Kirk, 2013, p.164). Comments indicate that it is not about the time spent at check-in, it is more about getting reassured that they will get on their flight. Once older passengers had talked to a check-in agent, had their boarding pass, knew where to go, they felt less stressed and were less anxious as they proceeded through the airport. Personal interaction with and reassurance by check-in staff played a vital role for them.

That reassurance by check-in staff and provision of ‘a good feeling’ are important to the older leisure travellers is congruent with Prebensen and Foss’s (2011, p.55) research. They cite the airport check-in situation as an opportunity for consumer participation. The personal interaction with staff gives the older leisure traveller an opportunity to co-create value, which is of importance to a good experience (Table 2.3) (Neuhofer and Buhalis, 2014, p.131). These findings emphasise the importance of the ‘people’ component in Lally and Fynes’ (2006) model on the service experience (Figure 2.1). In the context of this research, the ‘people’

component stands for frontline employees who deliver passenger services, ‘contribute to social interactions and facilitate participative activities’ (Lally and Fynes, 2006, p.14).

The speed of check-in is followed by the efficiency of passport control, which a total of 21 interviewees consider to be ‘very important’ or ‘important’. Older passengers regard passport control as a necessity but also as a nuisance, especially when the queues are long (Frontline4). That waiting in line plays a vital role for travellers is congruent with prior research findings. According to Wittmer (2011, p.137), time is an important customer value factor for passengers. The findings of this work show that the older people interviewed do not differ in that regard. However, the waiting is not necessarily physically exhausting for them, it is more about feeling reassured by getting to the gate as quickly as possible. Although interviewees mention that they tend to arrive early and that they plan for extra time at the airport, they do not appreciate it when they have to wait.

Next, customs clearance and security screening is rated as ‘very important’ by eight and as ‘important’ by 12 passengers. It is a standard process and passengers show little emotional involvement with this contact point. They cannot recall having any ‘unpleasant experiences in Frankfurt’ (Passenger19). They do not have problems with security as such but again find the waiting ‘really awful’ (Passsenger12). Management interviewees point out that customs clearance and security screening can pose problems. The additional security measures that have been introduced over the years have complicated this process further. In particular, for older people it can be stressful to know how to pass through security and comply with the regulations and requirements:

> That can be *very stressful* because you are being asked to take out all your liquids, gels, monies, out of the pockets, all kinds of things […] they may be holding up another line (Manager1).

An observation provides additional insight into how some older leisure travellers feel when they pass through security:

> The couple waited for their turn at security. They removed jackets, belts and wallets and wanted to step forward through the scanner. The security employee asked whether they had any liquids in their carry-on bags. 'What do you mean by "liquids"? We have a bottle of water with us. My husband needs the water to take his pills', responded the woman. The security employee responded that they 'are not allowed to bring a large bottle of water with them through security'. 'But we need the water and we don't want to wait when we finally get it on the plane', the man said. To that the airport employee responded 'Well, you can always buy another bottle once you have passed through security, at one of the shops'. The woman shook her head. 'You know, you just ruined the start of our holiday with that statement and how you treat us. *All this flying with all these regulations is just not for us anymore. That will be the last time for us'* (Observation36).

Research by Bowen and Headley (2000) shows that the effectiveness and efficiency of security screening is a key feature that affects passenger satisfaction. Since 9/11, airport screening procedures have been the focus of complaints by passengers worldwide. While there is a common understanding that security and safety have to be a top priority, passenger satisfaction has declined due to waiting times and poor customer service. Gkritza, Niemeier and Mannering (2006, p.219) conclude in their study that waiting time significantly affects customer satisfaction with screening procedures. The previous observation shows that the couple's dissatisfaction with the process might have been sufficient to stop them flying in the future.

Upon arrival, luggage retrieval, i.e. getting checked-in suitcases back in a timely and orderly manner, is considered to be 'very important' or 'important' by a total of 19 out of 25 interviewees. Luggage retrieval at Frankfurt Airport gets mixed feedback. 'Sometimes that works well;

sometimes it takes a long time and sometimes it goes absolutely fast' (Passenger16).

One passenger admits that luggage retrieval is stressful for her (Passenger9). Upon departure, 19 interviewees attach a similar level of significance ('very important' and 'important') to a spacious and relaxed gate area in which to wait prior to boarding the aircraft. The gate area is regarded as a 'physical' service component in Lally and Fynes' model (2006, p.14). It adds to the overall service experience and should be designed to meet customers' expectations. From the perspective of a manager, the situation at the gate area is represented as follows:

> I think the gate area is a huge issue, especially at Frankfurt Airport, [hm] where there is just no space, not even enough space to stand at some points in time for customers to wait for the aircraft. And that creates a lot of stress when you have people trying to look for a seat to sit comfortably and wait for their boarding. I think that whole area needs a lot of focus (Manager1).

The commercial offerings 'availability of shops' (three ranked them as 'important') and 'duty-free goods and associated services' (six ranked them as 'important') are ranked last. Not a single interviewee considers these commercial offerings as 'very important'. An older traveller speaks on behalf of the majority of interviewees when she states that she does not consider the commercial offerings as being of significance at all. She does 'not need anything from all these things' (Passenger3): a finding that is of interest to airport management when they decide upon their commercial offerings. The literature review shows that deregulation and privatisation have led to airports' increased commercialisation. At major international airports, it is mostly the commercial sector that caters for the enhancement of the airport passenger experience. Retail sales are the greatest revenue generator for the airport operator (Graham, 2014, p.207) but older travellers interviewed rank the commercial offerings last.

In conclusion, this section contributes to a better understanding of the significance of some commercial and non-commercial points of contact in the airport product. Data is presented that explains the reasoning behind the evaluation of the service points to provide a fuller understanding of the service encounter. While Page (2005, p.282) does not segment these points by passenger type, this analysis ranks them from the perspective of older leisure travellers. Thus, this research fills a gap that Page (2005) left with his study. This work's findings stress that the group of older people attaches little importance to commercial offers. They attach more importance to a reliable service provision in the non-commercial area, i.e. the operational passenger process.

5.2.4 The Passenger's Airport Experience

Sykes and Desai (2009) provide a key model for further investigation of the commercial and non-commercial service offerings within the traveller's airport experience (see Figure 2.2). The following discussion of the findings is structured in concurrence with the six themes that are identified by them (Sykes and Desai, 2009, pp.1-3). They impact the quality of the passenger experience and are (in order of importance): 'end-to-end reliability and efficiency', 'information and communication', 'customer care', 'facilities and entertainment', 'airport design and maintenance' and 'cost'.

5.2.4.1 End-to-End Reliability and Efficiency

In general, the satisfaction with the reliability and efficiency of the infrastructure at Frankfurt Airport is - with a few exceptions - very high among older leisure travellers. This is important because views on an airport's role differ. One interpretation is that the airport's primary role is that of an enabler for airline services (i.e. that of an infrastructure provider for transportation) (Basole and Rouse, 2008, p.57). The passengers interviewed praise the airport in this respect. 'I actually do not have any

unpleasant experiences in Frankfurt', states one (Passenger19). Few critical remarks are voiced. For many interviewees, Frankfurt Airport is the logical choice for departure because of its proximity to their homes. When asked about alternative airports, many interviewees state that there is no need for them to go to one. This contradicts the statement by the CEO of Bremen Airport who thinks that older passengers prefer smaller over bigger airports because of easier passenger processes (Krane, 2011, p.1). They might prefer smaller but their airport choice is dependent upon other factors. A senior manager explains the advantages of a major airport:

> The small airport has the advantage of shorter distances, clear and easy to navigate. The larger airport has the advantage that usually the flight is cheaper there. The processes are more efficient there. It usually has more offers, which is important. Keyword, I've missed a flight. Do I have to wait a week until I can fly again? Or just two hours? (Manager10).

The older leisure travellers' responses show that they indeed appreciate Frankfurt Airport for its offerings. 'The direct flight' (Passenger27), 'non-stop connections' (Passenger35) and 'the airline' (Passenger21) are important factors when they decide to travel from a particular airport. Airport access (Loo, 2008, p.121) is another factor that impacts FRA's popularity. FRA can easily be reached by all modes of transportation, including taxi and train. While negative comments were few, the parking situation and the service provided in front of the terminals for passenger drop-off and pick-up are criticised. 'Parking is indeed a catastrophe. Fifteen minutes, if you ever get space' (Passenger9). Furthermore, 'parking fees are considered as prohibitively expensive' (Passenger25).

The benefits from flying from a bigger airport, such as above-mentioned flight schedules, outweigh the sometimes more difficult and stressful passenger processes there. The findings, however, also disclose the need of older travellers for the airport to be simple and straightforward to navigate.

> Orientation, orientation, orientation. Assurance in the orientation and a degree of certainty. How long do I need to get to the gate? How long does it take for the process? How long do I need for the check-in? That's a big problem (Manager12).

Utmost importance is put upon proper orientation when older travellers journey through the airport buildings. The passenger needs to be reassured that he or she has found the right way to the boarding gate. A senior manager notes that the efficiency and reliability of passenger services have gained in significance.

> [I]t was all about price, about rapid transit traffic, that's it. I think today a lot more ... the issue of *quality* has become a priority. An issue that will be perceived more and more by the passenger. The passenger will be aware of how he can change aircraft at an airport, how he is welcomed at an airport as a guest. Or whether he is *just handled and processed* (Manager5).

This statement also shows that the concept of service experience gains in importance as passengers get more demanding (Graham et al., 2008, p.1). They increasingly want to be 'welcomed as a guest' and not 'handled and processed'. They ask for a memorable, pleasant experience to enrich their holidays.

With one focus of this work upon how the airport deals with passengers who are reduced in their mobility, the question was posed of whether the service offer that is in place for these passengers works efficiently at Frankfurt Airport. Praise for this service's work comes from one interviewee, an 86-year-old woman who regularly makes use of the assistance that is provided by FraCareServices.

> I am 90 per cent disabled and therefore I get [uh] a wheelchair. Then, we are taken to a lounge. And there we can drink water, drink a coffee, we get cookies [laughs] and that's nice […] and then we will be picked

> up again and then I insist on such a truck that lifts me up. And there you go right onto the plane (Passenger22).

This description illustrates that the process that is in place for passengers who are reduced in their mobility works well. Section 5.3.5 elaborates upon that service's reliability. In Sykes and Desai's (2009) study of the passenger airport experience, the theme of 'end-to-end reliability and efficiency' ranked first in the eyes of their respondents. High importance was put on a smooth and less onerous passage through the different service points at the airport. Sykes and Desai (2009, pp.15-23) define this theme in terms of the overall journey's reliability to and through airports, flight delays and queue management. The findings reported in this section show that older travellers at Frankfurt Airport had a different focus. Satisfaction with the airport's reliability is high among the older travellers. Flight delays and queue management were not raised as issues.

5.2.4.2 Information and Communication

Information about flights, baggage reclaim, airport and airline requirements as well as signage and directions are of significance to the airport experience. Signage and way finding throughout the terminal building are often cited as causes for complaints (Sykes and Desai, 2009, pp.23-27). To ensure that signs are effective, people's physical and cognitive needs have to be addressed in an appropriate manner. Signage needs to be concise, located properly, conspicuous, comprehensible and legible (Transportation Research Board of the National Academics, 2011). This section reports how older travellers perceive signage at Frankfurt Airport.

The ease of way finding, particularly at an airport of this size, is deemed to be important by all interviewees.

> Well, Frankfurt Airport, being such a large airport, makes it very difficult for an older customer just to manoeuvre through the airport. I think signage is very difficult; it is very hard identifying where you are going. I think there is just *not enough and good enough signage*. I think that makes it very difficult (Manager1).

The interviewees agree that signage needs to be clear, simple and understandable. Proper signage at an airport is considered to be of value. When asked what senior-friendly means to her, one traveller answers that '[t]he most important thing is good and proper signage that is simple' (Passenger13). In contrast, poor signage is characterised as too difficult to read. It makes it stressful to navigate through the airport. Signage needs to be 'clearer, larger, perhaps using more characters and symbols instead of writing' (Frontline11). The major colour that is used at Frankfurt Airport is blue, as part of the corporate design. A manager comments on the use of this colour within the terminal building. 'Blue on white, this is exactly the colour that seniors have difficulty reading. With increasing age [...] you get a yellow tinge' (Manager13).

Proper signage within the airport's terminals is important, particularly for passengers who are reduced in their mobility. Addressing their 'wayfinding needs' presents a 'major challenge to terminal designers and operators and new legislation will require improved provision for their needs' (Caves and Pickard, 2001, pp.9-15).

Besides signage, language evolves as an issue. As the primary language, English - besides German - is used throughout the terminal buildings for communication and operations. The findings disclose that it should not be taken for granted that older passengers have a good enough command of the English language. Not every passenger who passes through the airport speaks English.

> We deal just casually with English words, with language habits and the announcements in the terminal. Those are just things that are, for us,

> normal and everyday; for an elderly person that is sometimes a huge burden (Frontline11).

Sometimes it takes frontline staff more time to deal with older passengers who do not speak English. This impacts the standard passenger process because employees need to spend more time explaining and helping them through (Frontline4). The following statement points out that some frontline employees lack sensitivity when they deal with passengers who are not in command of the English language.

> The mindlessness: they ask an elderly grandmother who does not speak any English and all at once she starts crying. And I go over there and ask her. And she says she *does not understand English*. They [security] claim it is a random investigation (Passenger4).

This insensitivity by frontline staff toward the older person affects the experience in a negative manner. The 'people', the 'process' and the 'service benefits' components (Lally and Fynes, 2009, pp.8-9) fail to deliver an adequate service experience at the security point, not only to the 'elderly grandmother' but also to Passenger4. The statement also shows that heightened security measures increase older travellers' stress levels (Bowen and Headley, 2000; Gkritza et al., 2006). Security screening reduce the leisure travellers' comfort at the airport (Brilha, 2008, p.172). It frightens some older people.

The following observation describes how airport management tries to improve the passenger experience in terms of information and communication. The measure aims to increase the level of comfort.

> Only recently, the main duty-free shops have installed an electronic display on which the time is shown that it takes to get from the shop to the gate (approximate walking time). The couple was browsing through the duty-free; the man always looked at his watch and then at the boarding pass. 'Please let's go to the gate', he told his wife. The duty-free shop employee overheard this and said 'Have you seen those

> boards we have up now? They show you the time it takes to get to the gate'. To that the man responded, 'I don't trust that one. I don't want to be late for our flight'. The couple left the shop; the employee shook her head (Observation46).

This observation confirms that 'airports are unique retailing environments in which travelers experience feelings of anxiety, stress and excitement' (Lin and Chen, 2013, p.426). Chung, Wu and Chiang (2013, p.28) conclude in their study on passengers' shopping motivation and information seeking behaviour: '[A]lthough passengers typically face pressure to be at the boarding gate by a certain time, in a large enclosed and unfamiliar space, where they can become lost easily, an environment that enables convenient shopping decisions can prompt passengers to use all retail information sources'. Another study on airport retailing (Crawford and Melewar, 2003, p.96) also stresses how important it is to reduce the stress and anxiety that is associated with air travel.

In times of increased privatisation, commercial revenue generation is central. Management is aware of passengers' anxiety within the airport environment and tries to reduce these negative feelings. Although these information displays have been introduced as an extra passenger service offering (and to allow the passengers more time to generate revenue at the shops), older travellers do not necessarily trust these new technologies or do not perceive their benefits. This behaviour is in line with research findings by Herstatt et al. (2011).

5.2.4.3 Customer Care

All interviewees attach an important role to customer care when they travel through the terminals. The findings demonstrate that older leisure travellers wish for good and readily available customer care. The general notion is that the older they are, the more they appreciate being looked after and taken care of. More personal attention and individual service are required (Passenger11). A frontline employee (Frontline11) thinks

that it is ‘irreplaceable’ that a human being is there to offer advice and extra information. Customer care in the form of personal service is deemed as particularly important to reduce the level of stress as the previous section has shown. Older passengers, in particular, suffer from a higher degree of anxiety and stress within the airport environment (Crawford and Melewar, 2003). A manager proposes that good customer care provides older people

> with a sense of *feeling safe* [...]. Give them some services to give them a hand and to calm them down. It is already exciting and upsetting enough due this hustling and bustling (Manager6).

To make the travel experience as non-threatening as possible, good customer care should primarily cater to basic passenger needs, as the following observation shows. It took place at Terminal 1, hall B, in front of an Airline10 ticket counter.

> The older man (estimated age over 85) seemed to be disoriented and lost. He walked up to the ticket counter and asked for directions to get to his flight ‘to Stockholm’. The ticket agent asked him if he meant ‘Airline3’. He did not know and showed him his documents. The ticket agent told him ‘to walk towards A where Airline3 is located’. The man refused to do so. He insisted on personal help and asked the agent to walk him over there as he claimed not to know where to go. The ticket agent said he could not leave his counter and that the man had to walk over there by himself. The man started yelling at him. That attracted the attention of airport staff (‘a red coat’), who came over and offered to accompany the man to Airline3. The two of them walked off (Observation3).

One possible interpretation of this observation is that for many the airport is overwhelming. Its various processes are not easily understood. At the same time, passengers demand a certain level of service. Instead of knowing that he has to check-in with the airline (‘Airline3’), the older man only knows where he wants to travel to (‘Stockholm’). The fact that the

man addresses a ticket agent of another airline shows that travellers do not necessarily differentiate who provides help to them. They pay little attention whether it is airport staff or airline staff or someone else. Finally, however, a standard airport process is in place to meet the man's needs. Airport staff ('a red coat') is present and provides the needed assistance. He ensures that the old traveller finds his way through the airport. This observation shows the significance of the 'people' component in Lally and Fynes' model (2006, p.14). Qualified personnel are required and need to be present to help with the core service (i.e. the passenger process).

Sykes and Desai (2009, pp.27-31) also show that the quality of customer care is of high importance. They define customer care in terms of the friendliness and helpfulness of staff, service for passengers with reduced mobility and problem resolution. Their definition of customer care, however, is one dimensional, i.e. the airport provides care to the traveller. The findings of this work reveal that this component becomes increasingly multi-faceted. Interviewees mostly associate personal service and social interaction with customer care. Travelling is regarded as a form of social interaction. Many older leisure travellers interviewed appreciate it when a person is there whom they can interact with.

This wish for human interaction is in line with work done by Prebensen et al. (2003, p.416) and Oh et al. (2007, p.121). According to them, holidays are tightly associated with the concepts of interaction (see Section 5.2.1). People look for social exchange, and progressively more so in older age. This wish for social interaction as part of the holiday experience is congruent with the concept of customer engagement (Van Doorn et al., 2010). It also confirms Grissemann and Stokburger-Sauer's (2012) findings that co-creation positively affects customer satisfaction. A passenger explains his motivation for engaging in social interactions when he travels. Personal contact enriches his life:

> I think it's a shame that *the interpersonal interaction disappears*. I think that's a shame that this happens in society. The waning interaction - *I*

> *find that all very sad*. I think the personal encounter, even if it is only brief, is interesting. Because out of this, motivations or suggestions can arise (Passenger18).

Kirk (2013, p.166) provides evidence that this 'interpersonal interaction' improves the airport experience because passengers' expectations are exceeded: 'Short social conversations at the check-in domain led to passengers associating that domain with a positive experience'. This section has shown that good customer care is important to address older passengers' basic travel needs. More and more, this customer care is now associated with personal interaction to enhance the overall quality of the airport experience. Findings of this work confirm research by Kirk (2013, p.164) who demonstrates that engaging passengers in the passenger process improves their overall airport experience.

5.2.4.4 Facilities and Entertainment

In Sykes and Desai's study (2009, p.32), respondents mostly associate shopping, eating and drinking with 'facilities and entertainment'. The same holds true for this work's findings. The most comments are made about the number and variety of shops. The comments reflect back to the airports' development, described in the literature review in Section 2.6.3. Interviewees maintain that they are aware of airports' increased commercialisation. Many interviewees describe Frankfurt Airport as a 'shopping mall'.

> I've noticed that there are more shops. *You feel like being in a small* [shopping] *mall* actually. And you do not really need to shop somewhere else; you can get everything at the airport. [Uh] You even find doctors there. [Uh] There is a pharmacy, there is a cleaner, supermarkets, not one but several. The shops, sometimes they are open 24 hours; you can also go shopping at night (Frontline10).

According to Echevarne (2008, p.188), airport shopping is a central part of the airport terminal experience. This research shows that the importance older leisure travellers attach to shopping does vary. Some interviewees hold the view that the airport experience suffers from the airport turning into a shopping mall. For example, a frontline employee thinks that service quality in the standard passenger process decreases with increased commercialisation: '[I]n today's world*, retail is more important than the convenience of the customer*' (Frontline2).

Some leisure travellers engage in 'window shopping' (e.g. Passenger32). Some are being rushed through the stores. Many interviewees are not interested at all in browsing through the retail offer or in consuming anything before they board the flight. These findings add another dimension to comments by Forsyth, Papatheodorou and Graham (2008, p.338). They contend that leisure travellers who travel on low-cost carriers are willing shoppers at airports. While their findings suggest that low-cost travellers are not necessarily price-conscious or even thrifty, the findings of this work suggest something else: older travellers do not associate the airport with the need to shop. They are more interested in its basic service provision which allows them to board their flight. Forsyth et al.'s (2008) work does not differentiate by travellers' age. Whether a correlation exists between their age, their purchasing behaviour and the type of air carrier used needs further exploration. This work's findings show that the group's reasons not to shop are manifold.

> I also like the nice shops in Frankfurt. I like them, too. Although I do not get a chance to shop because my husband goes by these stores very quickly (Passenger31).

One passenger states that he would appreciate less pressure to consume when he just wants to sit down and rest instead:

> if one has some time, one has an hour to wait or two that you have an area to relax. Without the need to consume anything […] I think in

> Frankfurt if you want to sit down in Frankfurt you have to consume something. Unless you have lost it and I think it's great if there would be an area with a bit of entertainment. […] Yes, a large TV, screen, where NTV is shown, anything. Euro News. I have seen something like that and this is very popular in Majorca, for example. The seats are full, almost always. Because there is a difference. I can [consume], but I do not have to. But many grab a beer and drink it there then. Do not get me wrong, I'm not a cheapskate, but if you pay seven euros for a beer in Frankfurt or six […] *I care about my wallet'* (Passenger20).

This passenger asks for non-commercial service offerings (a 'large TV') to enrich his airport experience. This statement also points at another characteristic of the older travellers: they are price-conscious. And they perceive the prices at the airport as high. Although this man is willing to spend money, he resents feeling 'forced' to consume. A rest zone with the possibility of watching television represents a value-enriching element of the experience for this traveller. When asked about what retail offerings are the most valuable for her, another passenger states that sometimes she buys 'a book, but nothing else'. She points out that

> the purchases at the airport, or if you want to drink something too, this is all *twice as expensive as outside*. And I do not see a necessity for that, frankly (Passenger25).

This comment is reflected in older people's low usage rate of restaurants and retail stores that was noted by a market research manager (Manager12). It is also confirmed by the findings in Section 5.2.3 that hint at the low ranking of importance older leisure travellers attach to commercial offerings, shopping in particular. Another perspective on this finding is provided by a manager who thinks that the airport shopping experience does not cater to the needs of older people. In her opinion, the area is improving but basic offerings are missing:

> I think shopping is slowly getting better, I think there was not that much in the past. Shopping in certain areas is still not good. If you look into

> terminal A, the US departures, there is very limited shopping and I know that some of these customers, which *we as an airline want to process through that area quickly*, there are not many options for them to actually have a drink, get a coffee or even other shopping opportunities (Manager1).

A manager of Fraport's central infrastructure (Manager7) admits that the shopping areas at Frankfurt Airport are planned as a 'walk-through'. To entice shopping, the layout forces passengers to pass through them to get to their boarding gates. At the same time, airlines are not too fond of airports turning into shopping malls as measures like this one affect their basic operational processes. An airline's objective is to get the passengers to the gate quickly and on time for departure. A manager questions the benefits of restaurants and shops for the airport experience altogether. He voices his criticism and thinks that shopping only distracts from the actual experience of flying from A to B:

> It is all about how you go through the experience; the shopping does not make a difference. We fly from a lot of airports around the world or out of Africa where there is no shopping mall attached to the airport and customers are just happy with the process. [...] in itself *I don't think it makes a good airport experience; it is a means to an end for the airport operator but not so much for the customers* (Manager9).

This statement also points out that airports' and airlines' interests within the terminal building can collide. Airports aim to generate retail revenue; airlines focus on process optimisation. They want to bring the passengers onto the aircraft in an efficient and fast way. This conflict is further discussed in the next chapter, on the findings on the supply side.

5.2.4.5 Airport Design

The state of the terminal buildings at Frankfurt Airport is subject to many critical remarks from all three groups. Due to various problems, the

buildings are considered to be crowded and lacking in atmosphere. One passenger describes the airport as a 'juggernaut' (Passenger5). One employee compares it to 'a spider whose legs have grown longer and longer' (Frontline8). Another interviewee argues that the state of the infrastructure adds stress to the travel experience: '[I]t is a very *stressful environment.* […] always *crowded.* […] in *need of renovation*, […] a very *suppressing atmosphere* with the low ceilings and everything is old-fashioned' (Manager1).

A manager tries to find an explanation for why the state of the terminals is regarded as dismal in the eyes of many travellers:

> [It] goes back to having an *historic building* … then you just have to deal with that. It was designed in a completely different dimension than what we see passing through now with regard to the sheer number of passengers. […] it would be desirable to make everything bigger and better and wider, which can be considered with a new building in any case. But within the given circumstances, there is really no chance. And the problem is, after all, that everyone wants *to fly at a cheap price but still expects the full service* (Manager3).

According to Janic (2003, p.246), 'once an airport terminal is built, the quality of service is expected to be constant and guaranteed according to the space/time standards determined in advance for given traffic structures'. This statement by Manager3 shows that at Frankfurt airport these standards have deteriorated since it was built. Increased passenger numbers (Table 4-5) lead to congestions which affect the perceived service quality within the terminals. One objective of privatisation is that airports generate revenues that can be reinvested in infrastructure (improvement and maintenance) (Freathy, 2004, p.192). Although many different projects have been introduced over the years to improve Frankfurt Airport's infrastructure, many obstacles have had to be overcome as the passenger numbers were rapidly increasing at the same time. New construction projects try to accommodate this passenger

growth but all measures take place within a given, space-restricted infrastructure, an ‘historic building’.

Interviewees mention that they are aware of the airport’s constant need for renovation. They state that this affects their experience negatively. Besides construction, the airport’s general layout affects the passenger experience. One main point of criticism that came up is that passengers have to transfer across many levels as they journey through the terminals. Often escalators and elevators are out of order and passengers are forced to climb stairs with their luggage (Manager14). Another manager specifies that the state of the infrastructure poses problems when providing assistance to those in need:

> [F]or the care service process, where they are so dependent on lifts and they have a real issue, especially when they fail […]. Not only the escalators. For weeks some elevators were not working at the bus arrival. Or they have no way to baggage claim. No reasonable way to the elevator. They have actually to go around then on the outside. Or try travelling with an elevator, a small one here, at the central railway station […]. Yes, it is an *obstacle course* (Manager11).

The following observation took place in arrivals, before immigration in Terminal 2. It confirms the former statement.

> Airline7 crew members got off their flight together with the passengers. The elevator leading down to immigration was broken; no help or information was in-sight on how to go downstairs. The flight attendants (in their 50s) had their bags with them. Cursing Frankfurt Airport (‘this always happens here’) they started carrying their bags down the stairs by themselves. The passenger (estimated age over 75 years) did not know what to do; she appeared to be rather helpless and desperate. One of the flight attendants told her that she would be back to help her down the long staircase with her bags. She climbed up the stairs again and helped the woman with her bag. The other flight attendants waited

> for her and told her how nice that was of her. Airport staff provided no assistance (Observation9).

Chang and Chen (2012, p.535) show that mobility-reduced passengers complain most about the distances they have to cover. Their findings stress the importance of barrier-free infrastructure. This observation shows how important reliable and working elevators are for older people. FRA's infrastructure fails to support the older traveller in this situation. The 'physical' component of Lally and Fynes (2006, p.14) experience concept model impacts the passenger's experience in a negative manner. Employees are not present to assist the woman down the stairs ('people' component). The passenger relies upon help by airline staff (flight crew and not ground staff). Halpern and Graham (2013, p.28) comment that as a result of privatisation, airports are accused of neglecting the interests of airport users. They reduce service quality and avoid investments in infrastructure. This observation shows that this may be true. When asked whether the needs of older passengers are taken into account with new construction projects at Frankfurt Airport, one manager recalls that

> there was some discussion because of the [uh] moving walkways. Whether you should set them up or not. And when it boils down to *getting rid of the moving walkways because of penny pinching, then something is wrong* (Manager4).

Observation9 and this statement show that although the airport contends to strive for excellent service quality in its design, decisions are made in light of costs. Both examples indicate that something is wrong with the service provision by the airport. As Zhang and Czerny (2012, p.30) point out 'there may be a discrepancy between the welfare-optimal and private airport behaviors' as a result of airport privatization and regulation. The airport operator fails to meet the needs of older travellers. It decided against setting up additional moving walkways - a value-enhancing service feature for travellers - because of the associated costs. Moving

walkways would contribute to a better service experience for the older travellers, as long walking distances pose major obstacles (Chang and Chen, 2012, p.535).

> Older people often have to walk a *long, long way to the gate.* That's the worst thing […] the one thing I don't like is they are building gates that are miles and miles and miles away. It is just getting bigger and it takes longer to get anywhere. So you are kind of worried about whether you are going to get to the gate in time (Passenger6).

Besides the physical aspect of having to walk long distances, this passenger mentions that it worries her when she does not know how long it will take to get to the gate. An interviewee who comments upon the airport's layout upon arrival confirms this:

> There begins the stress and they think they might not be picked up and [uh] or that they cannot find the exit right away, or they have to wait a long time for the luggage and then perhaps someone who waits for them outside is kept waiting and they cannot find them (Manager11).

These findings show that the airport experience is affected in a negative manner because of uncertainty and the stress that is caused by certain layout features of the airport's design. In Sykes and Desai's report (2009, pp.35-38), the aspects of airport design that are important to the passenger experience include 'building, layout and accessibility'. The findings of this work underline that those are also the themes that are of significance at Frankfurt Airport. Terminal infrastructure and airport layout do pose problems for older travellers.

5.2.4.6 Cost

The costs associated with the commercial and non-commercial passenger services at Frankfurt Airport are raised by many interviewees. Similar to Sykes and Desai's (2009, pp.38-39) findings, this theme is

brought up by the interviewees themselves and not posed as a question. The findings show that passengers expect the prices at the airport to be higher but are not appreciative of this. In general, commercial offerings are perceived as too expensive. This finding is in line with work done by Shaw (2008, p.43), who shows that the leisure air travel market is generally price-sensitive. The older travellers do not differ in that regard. The following observation took place at a shop in Terminal 1, hall B.

> The woman (estimated age over 75) is browsing through the perfumes that are displayed there. The man (same age bracket) is standing impatiently in front of the store. 'Let's move on. I want to go to the waiting area'. The woman doesn't react and ignores his request. She keeps on browsing through the retail offer. The man says loudly: 'I hate this. The perfume is more expensive here than in Greece, no use to shop here. Let's go. *I want our holiday to begin*'. The woman gives in, says 'You are right, let's go to the airplane' (Observation32).

This statement shows that the airport is not part of the couple's overall holiday experience. This is a finding that was confirmed by other observations (Observation27 and Observation48). The holiday begins on-board the airplane or in the destination but not at their departure airport. This adds another perspective to the idea of the 'the airport as a destination' (Feldman, 2009), a 'distinct social space […] that orchestrate[s] new forms of social and cultural life (Hannam et al., p.173) and to that of an 'aerotropolis' (Kasarda, 2008). It proves, however, that in the eyes of the older travellers not every organisation that offers a functional value (i.e. the infrastructure to board an airplane) needs to provide an experience (Basole and Rouse, 2008) (see Section 2.6.6).

Furthermore, this observation demonstrates that for many travellers it is part of their experience at the airport to browse through the shops. However, whether they actually are attracted to shop there can be questioned (Littrell et al., 2004). Retail prices are perceived as high and the offer does not necessarily meet their needs. Shopping for souvenirs

in the holiday destination (Greece) is of greater appeal to them. The shopping experience at the airport is not considered part of the holiday.

The research investigated further whether it is true that shopping at the airport is associated with higher costs or whether this is a subjective impression. A manager disclosed that, in general, the shops are indeed more expensive at Frankfurt Airport than high street shopping. According to him, it is also true that older people prefer to shop in their holiday destination (Manager16). Further exploration of the group's price sensitivity confirmed that for many older travellers the offering at the airport is not of interest to them.

> Requirements change throughout life. Like in the past, when I was not travelling that often by plane, and even on a flight within Europe, let's say, you had the opportunity to get alcohol and cigarettes, there was already a certain importance for that but now, judging from my personal feeling, it has become absolutely unimportant. At the airport, more shops and stores, restaurants have emerged over the years. I really wonder - because the prices you have to pay there; they are relatively high - that they are in such demand (Passenger10).

This statement needs to be taken into consideration when airports decide upon their retail offer. This passenger's changing purchasing behaviour explains the low ranking of the commercial service contact points by older people in general (as shown in Section 5.2.3). A manager offers more insight into the group's price sensitivity and the low usage rate of the commercial offerings:

> I took a look at why the usage rate of the restaurants goes down the older they get. That surprised me at first and then I thought about how price-sensitive they are. For them it is simply too expensive here at the airport. [...] it is evident from our data when it comes to parking and while shopping. And even here in the use of the restaurants (Manager12).

The price-consciousness of this group was surprising, as marketing's credo of 'older, richer, fitter' when describing the older consumer group does not hold true for the older travellers interviewed and observed. It confirms, however, research by Littrell et al. (2004, p.358) who investigate older travellers' tourism activities and shopping behaviours. Their findings show that older tourists 'attached limited interest to shopping during their travels [and] were unlikely to shop at retail venues'.

Some of the older travellers may be rich but a certain philosophy of thrift can be noted. While they might possess more disposable income in old age, this does not necessarily mean that they have changed their spending behaviour. Instead of more, some buy less. A manager warns against generalising their behaviour:

> Basically, *older people have more money, but many also do not have much money.* It always annoys me when it is said like there are all just rich people when they are old (Manager13).

At first sight, constraints to the growth of leisure travel in that segment appear to be few. Graham (2000, p.110), however, points out that 'the older persons' market is more likely to be constrained by income than by time'. This statement together with Manager13's comment stress again that the heterogeneity of the group needs to be taken into consideration. Stereotyping them is wrong (The World Health Organization, 2015a, p.3).

Besides investigating perceptions about the costs of the retail offer, the research also took a look at the costs associated with the commercial service offerings within the airport product. The following observation took place in Terminal 1, arrivals level, in front of the 'Welcome Centre'.

> One woman and one man (with a walking stick) had just landed. They (estimated age over 70 years) had two small dogs and their baggage with them. The woman and the man enquired about the available porter service. They were clearly struggling with the baggage (all piled up on a

> baggage cart) and the dogs. The employee at the 'Welcome Centre' quoted them the price and the time it would take for the porter to come for assistance. They decided to continue their journey to the train station without help. The woman was pushing the overloaded cart, while the man, trying to control the two dogs, walked slowly behind her (Observation16).

This observation underlines that older people, although they are in need of assistance, are still price-conscious. And they still remember the times when services were rendered on a complimentary basis and not regarded as sources ancillary revenues (Oxford Economics, 2010, p.14). The airport fails to provide them with the necessary support (at an acceptable price) that they need. In this case, the airport's 'worthwhile objective to support mobility' (Chang and Chen, 2011, p.1214) is not fulfilled appropriately. No adequate form of support is provided. To use the porter service for a fee is of no interest to the older couple. They prefer to struggle with their dogs and the baggage and continue their journey on their own. The couple's behaviour was confirmed by findings in the interviews (e.g. Pasenger11). Similar to the respondents in the study by Sykes and Desai's (2009, p.39), few interviewees consider paying extra for increased levels of service quality in the basic passenger process.

5.3 Treatment of the Older Leisure Traveller at the Airport

In the second part of this chapter, on the demand side, the discussion now turns to the treatment of the older leisure travellers within the regular passenger process. It seeks to understand whether they need special treatment or whether the existing services suffice. The regular process is broken down into distinct parts that were identified by the themes in the analysis: Section 5.3.1 presents the findings that describe the older travellers' expectations of their service experience at the airport. Then the role of personal service is described. Section 5.3.3 offers insight into passengers' satisfaction with the airport's service quality. The section that follows contributes to a fuller understanding of the standard

passenger services provision. Collected data that describes the services for passengers travelling with reduced mobility is presented in Section 5.3.5. The final section offers some insight into the effect of increased automatisation on the older travellers' airport experience.

5.3.1 What Are their Expectations?

With airports' evolving role as service providers for tourism, it was central to learn about older passengers' expectations of this part of their holiday. Knowledge of these expectations will enhance the understanding of what role the airport experience (as part of the older leisure traveller's overall holiday experience) plays. For tourism products, the service experience is a central success factor, according to Stickdorn (2014, pp.329-344). The sum of all activities account for this service experience. What do passengers expect of the process and discretionary activities that define the airport experience? First of all, the findings reveal that, for most, flying is nothing special anymore.

> Big, wide world? Yes, you get that but *it* [flying] *is now no longer something special.* Nope, if you have now flown for 30 years from time to time, then this is nothing that impresses you anymore. So this flair, this special something, I could not say that (Passenger25).

There is little emotional involvement with the airport. Three interviewees compare the airport to a train station:

> The airport has a meaning as far as … well, as a train station has a meaning. From there I travel. I hope everything works out. *Hopefully the connections work*. This plays a role (Passenger18).

> It is like when I take the train. When I sit down in the train that's the start of the holiday. When I sit in the train restaurant, drink my glass of wine. When flying, actually, only when I'm on the plane and when it has taken off. When the door is closed. Then, actually, *you can relax then, in the air. Everything before that is really just annoying,* I think (Passenger26).

> Yes, the *holiday actually starts for me at the moment in which I sit on the airplane.* Then I know it's happening. The airport is just as interesting as the Frankfurt central train station is for me (Passenger34).

While people's expectations 'in terms of convenience, comfort and service' (Frontline2) change when they get older, the airport is mainly perceived in its function as an infrastructure provider. When asked about their expectations of the airport, many interviewees state that for them the airport is a means to an end. *'[The airport] is actually only a means to an end. The airport does not provide me with a holiday feeling in that sense'* (Passenger16).

All interviewees expect the airport to provide the infrastructure and reliable operational processes for their flying. The provision of an augmented service experience with distinctive characteristics is not expected.

> I'm building a terminal here with concrete and then the aircraft will come and with them the passengers […]. *The factors are basic and everyone expects to see them fulfilled. Reasonable orientation, good processes and I do not want to walk two kilometres through the terminal* (Manager10).

As a result of these rather basic expectations of the airport's role, what happens at the airport is mostly not considered to be part of the overall holiday experience. Another manager explains.

> Going on their holidays, the actual holiday experience is what actually counts. *The flying and the going through the airport is just part of the necessary evil, if you like, to get from A to B.* And that's how a lot of people view their journey. So I think we are *overestimating the part that the airport plays in the entire experience.* What people care about is their hotel (Manager9).

This statement shows that the actual holiday experience in the destination is what matters most. Going through an airport is considered a ‘necessary evil’ and should not be ‘overestimated’ in this basic role. This interpretation is supported by the following two remarks by older leisure travellers: ‘In the end *it is about coming from A to B’* (Passenger20). ‘*You go there, take the plane and fly away.* One must consider that with a certain distance’ (Passenger24).

While for most interviewees the holiday starts generally on-board the aircraft or in the destination, only one traveller regards the airport as a source of holiday excitement. When asked what his experience looks like when he travels through an airport, a passenger states that ‘when I get into the airport terminal, even if only to pick someone up, I feel wanderlust. Yes, I have always felt that way, the urge to travel’ (Passenger30).

Furthermore, the findings show that passengers differentiate between what they expect of the airport and of the airline. For many, the primary contact is with the airline and not the airport operator.

> I don't expect the airport to be committed as such, in my view, to call upon me personally. For me, it is the airline […] the one ... with which I fly, the one I gave my money to for my flight. What I expect from the airline is that it personally looks after me, more than the airport itself. *The airport is practically there to provide the framework. […] The infrastructure, the scaffolding, which should then be filled with content from the airline* (Passenger11).

They expect personal service from the airline, not from the airport. The airport provides the ‘framework’, while the ‘content’ comes from the airlines. This interpretation reflects back to research by Bergadaà (2009), who shows that it is primarily the airlines that maintain - by means of the flight ticket - the actual relationship with the passenger. The airport customer is predominately an airline customer.

The older group's price consciousness also becomes apparent when examining their expectations. They are aware of the price they have to pay for flying. However, this price is associated with the price of the ticket or the overall holiday and not with services on the ground. When asked about their expectations about certain discretionary activities when they pass through the airport '[...] all the passengers ask for this and that ... but in the end, when we ask, "Are you prepared to pay for this?", then the answer is "No"' (Manager2).

While some interviewees show a willingness to spend money on additional service features, others expect a certain level of comfort to be provided on a complimentary basis by the airport. The following observation shows that expectations of the service offering are sometimes not met in this regard. The observation took place in Terminal 2, in baggage reclaim D.

> A group of four arrived from their holidays. Heavy suitcases came out on the baggage conveyor system. One woman tried to get a baggage cart out of the station but did not understand that she had to pay for it. Another woman pointed that out to her, but the four of them had no coins on them and did not want to use their credit cards. So they dragged their suitcases out into the arrival hall by themselves. The man said that every year when he flies, service worsens at the airport and that *'they just want to make money out of you'.* The three women nodded in agreement (Observation10).

The charging for baggage carts is something that varies at airports worldwide: some offer carts on a complimentary basis, others charge for them. The observation shows the dilemma Frankfurt Airport is in. It tries to generate additional revenues from basic passenger process activities (i.e. transporting suitcases). With that it fails to perform as a service provider. The 'commercial paradigm' (Graham, 2011, p.5) dictates its actions and the social obligation to cater to needs of travellers is neglected (Poria et al., 2010, p.224).

The airport's drive to generate revenues influences the experience in a negative way. The group feels that the airport wants 'to make money' out of them. The service experience is less than satisfactory for them, as they have to drag their suitcases by themselves. Furthermore, this observation shows that the group's expectations of the service encounter are different. They expected to receive a baggage cart for free. This is in line with Graham et al.'s (2008, p.1) observation that air passengers are becoming more experienced and demanding. Older leisure travellers, in particular, expect a certain level of comfort when they travel and are not necessarily willing to spend money on it. They do not appreciate being pushed through an airport system with its focus upon commercialisation. They are in search of a pleasant service experience and expect it to be provided for free. To conclude this section on older travellers' expectations, a frontline employee observes that

> […] even the very term 'process' or even 'passenger processes' already suggests that there is something that must change in attitude. Because *passengers do not just want to be processed* [...] that is in the English language, too ... it is called the processing of passengers, but this is just the wrong approach (Frontline4).

To get to the point where passengers do not feel processed anymore, the airport must proactively engage in the service economy. The role of the airport has to develop from infrastructure provider to service provider (Fattah et al., 2009). This section, however, has shown that the expectations of the airport's role as service or service experience provider are low while they are only partially fulfilled. Airports are perceived as a means to an end. Only slowly do older leisure travellers expect them to evolve within the service economy.

5.3.2 The Importance of Personal Service

All interviewees were asked how important personal service is to them. Section 5.2.4.3, on customer care, has pointed out that personal

interaction plays a growing role in the service encounter. Work by Prebensen et al. (2013) explores the importance of personal service for the holiday. According to them, only personal service and the time and effort spent on the journey show a significant effect on overall value of the experience.

A manager emphasises the older group's wish for personal service and contact:

> *Personal contact is desired*. This also came out of the customer satisfaction study. They also use the personal information desks more than the other target groups […]. Personal contact is desired and that is surveyed in the context of kindness of staff, but they use it more. And they also want to have more contacts in the terminal. Anywhere, if someone has a problem now, someone who stands there and can be asked; there were times, for example, when we had these golden angels who were in the terminal (Manager12).

The service offering by these 'golden angels' has stopped and jobs (at the minimum wage) were created for formerly unemployed people who now provide information throughout the terminals. 'Golden angels' were volunteers. Older and retired themselves, they provided assistance to travellers. It was mostly older travellers who were interested in talking to them - asking for assistance and tips on how to pass through the airport. This confirms older passengers' desire for human contact and is in accordance with research findings by Kirk (2003, p.168). He comments that sufficient information is provided around the airport but passengers do not pay attention to signage. He concludes, that '[t]he most efficient form of communication is shown to be face-to-face interaction between a member of staff and the passenger' (Kirk, 2013, p.168). The analysis of statements shows that older people prefer human interaction; it enriches their airport experience. A passenger speaks for many when she describes her feelings about personal service:

> when I, let's say, receive a friendly welcome from this girl or the young man who works at the check-in, I think that's very pleasant. And when they wish you a good journey and tell you that you still have an hour ... I would miss that if it would all be now about technology, if everything would be self-service (Passenger19).

This shows that the human contact element (the 'people' component in Lally and Fynes', 2006, p.14 model) is thought of highly. Older people feel reassured when they have a person who tells them what to do and how to proceed to get to their flight. Generally, all older travellers interviewed appreciate personal service. Some even contend that personal service is irreplaceable. They are critical of the increased automatisation that takes place within the airport environment, even if self-service technologies may lead to time savings on the way to the aircraft. To help them through the airport, older travellers are fond of a human being who is available to assist. Helpfulness and friendliness play central roles, as the following remark shows:

> some sort of guide that shows some helpfulness. I miss that. This is all *very impersonal* in Frankfurt. Everything is wonderful but ... and from an economic point of view, I also believe that you have to save money. But it would be nice if the treatment were *a little friendlier* (Passenger7).

Service staff's positive attitude and courteous and friendly service interactions were appreciated. A number of older people complained that the airport environment had become rather impersonal. Upon arrival at the terminal building, one interviewee voices her wish for some help:

> What I would appreciate a lot is when older people arrive at the airport … if there would be someone to help with the baggage. [H]e takes the suitcase out of the taxi and tells you where you have to go […] and you're already grateful if you get a little help like that. Because when you arrive and see this giant airport you do *feel just a little bit insecure* […] (Passenger15).

This shows that it is not only physical help with the baggage that is being wished for but also human contact. The reassurance provided by this 'someone to help' causes her to feel less stressed and less 'insecure'. Ganesan-Lim et al. (2008) show that customer age affects perceptions of service quality. This work's findings confirm that service quality in terms of interpersonal interaction is important to older leisure travellers. The following comment emphasises this wish for human contact as part of the overall holiday experience:

> Well, you are always *just a number basically*. And maybe when you're older, you are more aware of that than when you're younger. Contacts are relatively few to be found. If you require information this is quite difficult (Passenger13).

The statement also shows that, due to process optimisation measures, travellers run the risk of becoming 'just a number'. And this passenger is aware of this development. Thus, the provision of proper information in the right format is of significance for the experience. Ideally, an airport assistant would be there to help older passengers through the airport.

> For an older passenger it would be a simplification if he had *an assistant.* Not only for him, but that they might be in the group and that they are all accompanied through the whole airport from check-in to the plane. That there is someone there who specifically takes care of the needs of the elderly passengers. Who guides them through passport control and goes with them through the security check and then shows them the way. Because I would imagine that through this whole forest of signs, and the sheer size of the airport, that the passenger is often just a little disoriented (Frontline10).

A personal assistant would make the journey through the airport easier for older people. In particular, passport control and security are contact points where assistance is wanted. The terminal building is perceived as confusing and intimidating. Clear information and orientation are missing ('forest of signs'). The statement endorses why older people prefer to

travel as part of a group; they feel safer when someone guides them through the processes (Section 5.2.1). The idea of an airport assistant came up in a couple of the interviews. Older travellers, management and frontline employees think of it as an additional service offering to ease the passengers' journey through the airport. However, only a few interviewees are willing to pay for more personal service in the form of such an assistant. When asked if willing to pay extra for special personal service offerings, one interviewee provides a nuanced answer: 'if it is charged separately for, nope, no. However, if it is hidden in the ticket charge ... then yes' (Passenger1).

Finally, interviewees clearly distinguish between a higher level of service quality within the standard passenger service offering and the complimentary services that are provided for passengers travelling with reduced mobility. In the case of the latter, they think that personal service should be provided for free.

5.3.3 The Level of Satisfaction

Popovic, Kraal and Kirk (2010) report on research that investigates the airport passenger experience in terms of activities and interactions at the International Brisbane Airport in Australia. Using observational data, their focus is upon understanding the passenger experience to enhance airport terminal design. Popovic et al.'s (2010, p.9) work show that 'the way that passenger experience is facilitated leads to their [passengers'] satisfaction or dissatisfaction which can impact on passengers' basic emotional responses'.

The findings of this research suggest that older people perceive the quality of the airport's environment and its processes to be high. This is in line with Ganesan-Lim et al.'s (2008) findings; they observe that older customers tend in general to be more satisfied than younger ones. A manager in Fraport's market research department (Manager12) confirms that older travellers at Frankfurt Airport are the most satisfied of all

passenger groups. According to her, they display such a high level of satisfaction because ‘they are happy that they can still fly at all’. Other interview data confirms that the majority of older travellers speak fondly of the airport. One passenger expresses her feelings: ‘We love Frankfurt Airport’ (Passenger21).

Interviewees point out that it is a pleasant airport and that they are happy there. Apart from other factors, their level of satisfaction is high because Frankfurt Airport is conveniently located and readily accessible. FRA is at their ‘front door’ (Manager10) and the flights offered from there enable them to travel see the world while they are still fit to do so. Factors that are outlined by Loo (2008, p.121) to impact airport choice are confirmed (e.g. airport access, number of airlines and destinations offered). Many state that they never have encountered any problems there. Past experiences impact their level of satisfaction which is in line with research by Verhoef et al. (2009, p.31) who argue that prior customer experiences influence future customer experiences. Interviewees think that Frankfurt Airport is rather suitable for older passengers in need of assistance. All in all, they are satisfied with the basic passenger process, including the services that are offered to passengers who need help. This high level of satisfaction is mostly the result of complimentary service offerings. A manager is aware of this:

> First of all, you have to find a service that does justice to the elderly. And then, of course, if you provide the service then it has to be *a true service rather than additional costs*, which is seen as another source of revenue (Manager4).

In other words, the airport should not ask for money for certain services to keep up that high level of satisfaction (e.g. free provision of baggage carts). One interviewee asks for his fellow travellers to put pressure on the airport and the airlines to provide free services:

> Fraport has introduced these shuttles; they cost nothing and it even says so. Stop them, catch a ride and make it easier for people. […] And these things need to be increasingly demanded by the passenger, more and more (Passenger5).

That growing commercialisation at Frankfurt Airport can conflict with older leisure travellers' wish for complimentary services is apparent in the following observation. It took place in Terminal 1, hall C, at a coffee shop.

> The woman and the man (estimated age over 80 years) looked exhausted. They had just checked-in with Airline15 and wanted to sit down and take a break to recover. They sat down on two empty chairs that are part of the coffee shop located across from the check-in. The coffee shop employee was eyeing them, walked over and told them that the chairs are for customers only. They said that they just need to relax for a few minutes before they continue and that these were the only seats to be found. The employee asked them to move on, as they were not consuming anything. Upset, they got up and left (Observation24).

Research by Livingstone et al. (2012) on the airport passenger retail experience stresses the importance of service quality in this area: not only the processing activities in the landside area (e.g. check-in) but also the discretionary activities impact passenger satisfaction. This observation makes it clear that it is central to balance the interests of the older leisure travellers with those of increased commercialisation. Rest areas for travellers (without the pressure of having to spend money) become hard to find within the terminal buildings. The overall satisfaction with the experience at the airport runs the risk of being negatively impacted ('upset'). On a different level, this observation also shows that there can be doubts about the success of airport privatisation. Privatised airports can reduce their quality of service (Halpern and Graham, 2013, p.28) and older passengers are at risk that their needs will not be fully met. With increased pressure to operate commercially, it is difficult to satisfy 'social well-being' (Ison et al., 2011, p.1348) and enable mobility of all ages.

The literature review shows that there is evidence that airports can compete on the level of service they provide within the standard passenger services. The service element makes a contribution to the creation of perceived value (Hamel and Prahalad, 1994, p.229). Thus, it impacts the passenger experience in a positive or negative manner. Halpern and Graham (2013, p.142) elaborate upon the importance of perceived value for airports. Because of the intangible nature of the airport product, a good service provision is central.

This research looks into the question of whether the current standard passenger services provision at Frankfurt Airport meets the needs of older travellers. The findings indicate that the expectations of a 'memorable experience', in terms of the experience-based economy (Pine and Gilmore, 1998), are low. In general, older leisure travellers are satisfied with the current airport product. It is important to them that the basic passenger process works without flaw and they get to the aircraft in time. The majority of the interviewees perceive the airport product as an operational process they have to go through to get to their holiday destination. Thus, it is not a particular or 'memorable' experience per se. Some frontline employees and management confirm this interpretation of this part of the overall holiday experience. A senior manager states that 'no one comes to the airport because they want to have the most stress-free experience: *they come to the airport because they want to travel'* (Manager10).

This shows that airports are not expected to be service experience providers. Passengers are interested only in their functional reason (i.e. the provision of the infrastructure to travel) and not in 'the memorable events that surround them' (Pine and Gilmore, 1998, p.98). The focus is not upon the experience; it is upon the functioning of the operational processes. The degree to which the different elements of this standard process impact the airport experience is discussed here.

Throughout the terminals at Frankfurt Airport, at certain service points, queues are unavoidable:

> […] one tends to remember the negative things such as queues at check-in. Once I had to wait there for a long time. Once I had to wait somewhere else, at security; they are badly staffed (Passenger14).

That security screening, customs and passport control have to be part of the passenger process is widely understood:

> Everyone understands the need to have security screening and customs clearance and passport control and all that. I think it is just a matter of how the airport operates and how many stations are open. Because you do get frustrated when you stand in line (Frontline5).

Long queues can be exhausting for older passengers as their level of physical fitness varies (The World Health Organization, 2015a, p.3). Frustration starts to show, satisfaction declines when the contact points are perceived as being understaffed and the standard process fails.

Another point of criticism was the perceived lack of standards within the passenger process. The following observation took place in Terminal 1, hall A, behind the security checkpoint.

> The man (estimated age over 75 years) and the woman (estimated age over 70 years) were struggling to put their clothes, belts and shoes back on after they had passed through security. The man asked: 'Why did you have to take off your belt and I didn't? You left your shoes on, I didn't? All this is highly confusing; I don't understand this. Why is there no standard?' The woman just shook her head (Observation22).

In their study on the passenger experience in an airport, Popovic et al. (2009, p.3) differentiate between process activities (e.g. check-in, security screening, passport control) and discretionary activities (e.g. shopping, eating, drinking). They emphasise how important it is to

engage passengers in the security screening activities (Popovic et al., 2009, p.3). Observation22 is one example that shows that today's standard passenger process is confusing and fails to meet needs in that regard. The various security measures put in place since 9/11 have decreased travellers' satisfaction. While not stable over time, the effectiveness and efficiency of the measures affect the passenger's satisfaction with the airport product (Bowen and Headley, 2000; Gkritza et al., 2006).

Another observation serves to give a comprehensive understanding of whole process the passengers pass through at the airport. This observation started in Terminal 1, check-in hall A. The researcher followed an older couple all the way through to the boarding gate in hall C. They boarded an Airline3 flight to Montreal.

> The couple had just checked in their bags with Airline3 in hall A. The agent told them their gate and their boarding time for their flight to Montreal. She warned them that it would take them some time to get there. The couple nodded and left with their carry-on bags in hand. In hall A, they looked at the signage and tried to identify which way they should go. The woman went back to the check-in agent and asked again for directions. 'Just follow the signs to C'. They started walking. Ten minutes later they arrived at a checkpoint in hall C and asked the staff whether this is the right way. It took them 10 minutes at border control to pass through. Behind the control point, they did not stop at duty-free, nor at any other shop or restaurant. At the toilets, both went inside, came back and continued walking for another 12 minutes. Then they arrived at a decentralised security check for flights to North America. They asked again whether they were right because it all seemed such a long way. Security staff confirmed. There was no long wait at security but it took 15 minutes to pass through, only to have their passports and documents checked again at another stop where they had to wait in line for 10 minutes. Another five-minute walk later, they finally arrived at gate C16; both were quite exhausted and out of breath. The boarding was just about to begin (Observation42).

This observation details the different levels of contact the older traveller has to pass through. It reveals a couple of key issues that are verified by interview data. First of all, the older leisure travellers are still fit and in a position to afford a long haul holiday to Canada. They go through the regular standard process to get to the gate and manage to get there in time for departure. Way finding throughout the terminal building is confusing for them (Sykes and Desai, 2009, pp.23-27). Sufficient information is provided around the airport but passengers do not pay attention to signage (Kirk, 2003, p.168). Mostly they rely upon personal service to get information and reassurance on how to proceed. That reassurance by staff is important to them (Prebensen and Foss, 2011, p.55) and gives them an opportunity to co-create value, which is of importance to a good experience (Neuhofer and Buhalis, 2014, p.131). Social interaction enriches their airport experience. This behaviour confirms older passengers' desire for human contact and is in accordance with research findings by Kirk (2003, p.168).

The distances are long at Frankfurt Airport and although they were not walking at a slow pace, it takes the couple 1 hour and 15 minutes to get to their boarding gate. This is an indication that the distances and the airport layout can be a source of complication (Sykes and Desai, 2009, pp.35-38). Like almost all interviewees, they show little interest in the commercial offerings in the airside area. They pass by all retail and entertainment facilities but do use the toilets instead. Although no irregularities impact the passenger process negatively or slow them down, this observation shows how exhausting the airport experience can be for older, yet mobile, travellers.

All in all, the empirical results show that the provision of the standard passenger services works for the older traveller at Frankfurt Airport. The processes that are in place meet their basic needs on their journey through the airport. When still mobile, they are not treated differently from other groups. They participate in and pass through all regular customer contact points. No special services are offered on behalf of the airport

unless passengers themselves ask for personal assistance. This leads to the next section, on the services for those passengers who are more likely to need help.

5.3.4 Services for Passengers with Reduced Mobility

Being old does not mean being immobile. However, as a higher number of older people will be in need of assistance (World Health Organization, 2015), the research examines the airport experience of travellers with reduced mobility in greater depth.

Within the European Union, airports have to provide assistance to meet the particular needs of disabled people and people with reduced mobility. They are guaranteed equal opportunities for air travel and cannot be discriminated against (Vasiliadou, 2008, p.67). As social equality gains in importance for airlines and airport authorities, they have to offer an adequate environment for this group (Chang and Chen, 2011, p.1214). The range of commercial and non-commercial services is described in Section 4.3.6.1. At Frankfurt Airport, the provision of the non-commercial services is in the hands of FraCareServices. A senior manager depicts the services the company offers in detail:

> [T]he service begins at either a service point, a calling device or at a counter. In exceptional cases, we sometimes pick up the guest at the car park. Or pick them up at the front, because he arrived by taxi. Has a wheelchair or something similar […]. We also pick up our guests from the Central Railway Station. These are then of course also the long distances. Or even at the regional train station. And then a guest must have actually registered with the mobility service there as well. Because there is then a coordinated handover process in place when they arrive by train. If the guest arrives on the train, he is brought off the train by a railway employee from the train and then taken to the service point. They then call us and we pick them up at the service point. Down there at the local train station […]. So, upon arrival, we fetch the guest from the aircraft and bring him, as we help them with the luggage, back to his

> pick-up point, which is ideally at the door. We then help them with the parking garage, if needed, or bring him to the taxi. Or hotel […] or to the train station. If there are transfer guests, who the majority of our guests are, especially at an airport, where we have a lot of transfers, then the guest is taken to the next flight. Depending on his restrictions and how he can find his orientation by himself, he has to stay with us in one of the waiting rooms, or he is taken from gate to gate directly […]. We have agreed with the airlines that we offer drinks. So we have water, coffee, tea and some cookies, things like that (Manager11).

FraCareServices' main task is to ensure the smooth handling of disabled passengers. Its services are part of the extended standard passenger process that is in place. The senior manager states that about 600 employees, many working part-time, take care '[o]f about one per cent of all guests that are here for us as PRMs [passengers with reduced mobility]. Last year, we had about [*number removed*]' (Manager11).

She summarises the mix of passengers the company looks after. In the following statement, the abbreviation 'WCHR' stands for 'wheelchair assistance'. That does not necessarily mean that these passengers are immobile: they may be able to walk shorter distances by themselves but have decided against it. Passengers denoted 'WCHS' are able to climb the stairs to the aircraft. 'WCHC' denotes passengers who are handicapped to the point that they require medical assistance (Manager11).

> [T]he guests are quite different. The majority are already older people and if you break it down into the care categories, the IATA code breaks [...]. We have about 70 to 73 per cent; it varies a bit, WCHR monthly. The guys who are actually still very well, can still run, who can also climb stairs, but not longer distances any more. This is, between 20 and 30 per cent, WCHS [...]. Then we have about 4 to 5 per cent real WCHC, guests who are in wheelchairs. This in turn may be an old man, but it can also be disabled athletes, as we now have quite a lot for the Paralympics, who are all very fit or a wheelchair basketball team. And

> then we have one per cent, then, that's blind, deaf and dumb [...] they are relatively few. It is sometimes more so; there are different types of disabilities together. Or disabilities. Coming together (Manager11).

The statement points out how difficult it is to classify older passengers as passengers with reduced mobility. A frontline employee confirms that although some passengers are classified as reduced in their mobility, a differentiation based upon age is difficult due to the group's heterogeneity:

> And how can you differentiate as to their age? I mean, as you see today, *a passenger nowadays does not necessarily indicate whether he is in need of help or not; even if he is 80, he can still be partially fit.* That is not talking about the passengers who are already marked on the passenger list that they need a wheelchair (Frontline9).

When it is marked on the passenger list that they need a wheelchair, FraCareServices provides assistance. In general, interviewees who have used the service of FraCareServices appreciate it greatly. They praise its efficiency and the friendliness of its staff. The following observation demonstrates the experience of a woman, estimated age over 85, who made use of the service. The observation started at the FraCareServices lounge in Terminal 1. The researcher followed the older woman and her service assistant to boarding gate B14 in Terminal 1.

> The FraCareServices lounge for passengers with reduced mobility was quite crowded. The woman was sitting in a wheelchair with a small bag on her lap, sipping a cup of tea. An employee walked up to her and said: 'Mrs […], we will get going soon but you can finish your tea first'. The old woman smiled and nodded. Five minutes later another employee arrived, greeted her and started pushing her in her wheelchair. At security in B, they lined up for a special security queue with hardly any wait. The woman was allowed to remain seated in her wheelchair when it was her turn for the screening. The FraCareServices employee took the woman's travel documents and showed them at the control points

> (security, passport control). Only five minutes later the employee and the woman arrived at gate B14 for an Airline3 flight to Rome. The boarding was about to begin. The employee walked up to the gate agent with the woman's documents, showed them to the gate agent. She was then let through the boarding gate and onto the flight with the woman still sitting in the wheelchair. When the FraCareServices employee returned to the waiting area, the announcement for the general boarding was made (Observation44).

The number of people who require assistance is constantly on the rise (World Health Organization, 2015). Although the lounge was crowded, it was still a pleasant atmosphere for the older woman to wait in. Even a cup of tea was offered on a complimentary basis. This shows that FraCareServices is aware that it needs to provide a friendly and stress-reduced environment for its clientele. The physical transport of the older woman in her wheelchair to the gate works well. All operational requirements are in place to make the transfer from the lounge onto the aircraft less onerous. A standard process is in place that allows the mobility-reduced passenger to pass through a specially assigned security and passport control lane. The older woman was allowed to remain seated for her security check. At the gate, the gate agents knew how to proceed. They let the FraCareServices employee with the older woman onto the aircraft before the general boarding started, thereby avoiding possible disruptions to the general boarding. The whole process ran very smoothly. No breaks in the service delivery were noted. FraCareServices seizes upon the 'people' component in Lally and Fynes' model (2006, p.14) when they provide assistance:

> Of course, with our care services [FraCareServices], human contact is extremely close. Our employees spend an extremely long time with a guest along the way when they care for them. That goes so far that some people learn about the complete life story of a guest (Manager11).

A positive impression of the provided service is gained through an interview with an older woman who goes on holidays regularly. Often she and her twin sister fly from Frankfurt. She expresses her satisfaction:

> Well, in July, we will turn 86 and we need a wheelchair or something that can be wheeled. I could possibly even go up the gangway, but my sister can do that no more. And so we always order us a wheelchair. And so we are always, always brought in a wheelchair or an electric car onto the aircraft, always to the aircraft. And before that, on the way before, we are picked up at the check-in and then we will be brought to an extra room […] For waiting. And what's also nice again, because you can go to the bathroom. And you can have a coffee or water […] And also cookies (Passenger21).

Although she is 86 years old, she does not feel restricted in her mobility. She likes to travel and the airport provides her with the appropriate infrastructure and services to see the world in old age. Passenger21 was asked to elaborate upon what role personal care plays for her in that context. The woman spoke very highly of the caring attitude of the service staff. When asked what the greatest value for her in the whole process is, she said that it was ‘the cookies’ available in the FraCareServices lounge. This is a comment that shows that small things can make a difference. She explained that all is ‘very pleasant’ for her. ‘You wait there; you do not have to worry about anything’. When asked whether she thinks that the airport addresses the needs of older people, she states that ‘Yes, I am 100 per cent convinced of that. At least this is how I feel’ (Passenger21). She does not miss any products or services at the airport.

> No, no, maybe because I am still in control of myself and need no extra care. I have to say we really do not need anything. Just as I said, that you also get something to drink every now and then and also something to eat. But it's all there, from the pharmacy to the newsstand, right. And I find that very pleasant (Passenger21).

Although she relies upon help by FraCareServices, she does not think of herself as of being in need or ‘extra care’. She sits in a wheelchair but is ‘still in control’. This signifies that, for her, the received services are part of the standard airport product when she travels. She does not hesitate to use them and shows her appreciation of this complimentary service offering. Frontline employees generally praise the service offering of FraCareServices, too.

> *The collaboration works always well,* like I said, they are always ready and present and when we realise that we need some more, then they get there quite fast […]. They are always friendly and well-motivated (Frontline10).

The increasingly important role of this service for mobility-reduced passengers is emphasised:

> [W]e haven’t had very good examples of working together. We have a working group for all the American carriers working together because we all face similar situations. Especially with the remote positions and all the Indian traffic coming in, there are lot of old Indian customers […] Sometimes you have 20 wheelchairs on one aircraft […] and that becomes a real challenge. We haven’t been able to find a solution yet with our partners…. so this is a difficult scenario. […] it is going through the AOC [Airport Operator Committee] and then we have a separate working group (Manager1).

It is not the service provision by FraCareServices that is criticised by this airline manager, it is the challenge of accommodating the increase in the numbers of people who ask for wheelchairs. The analysis of the data shows that the rise in the numbers of passengers who require wheelchairs for departure or upon arrival does pose challenges to the regular operations. The following two statements by frontline employees demonstrate the effect the increase in the number of wheelchairs has on airport operations:

> *We have more and more people arriving in wheelchairs*. […] On flights to America we have already sometimes 10 to 15 wheelchairs […] that has increased over the years. And sometimes guests or passengers come in where I think, where do they fly to at such an age? (Frontline10).

'We had on the Frankfurt Delhi flight 30 wheelchairs. Yes, and you no longer knew how to master the situation because *the boarding took accordingly longer*' (Frontline9). When more people rely upon wheelchairs, the smooth running of the standard passenger process is impacted. Wide-reaching effects on airport operations are possible; the boarding takes longer, for instance, which can result in a flight delay. What the findings reveal is that interviewees think that wheelchairs are not only for people who cannot walk but also for those who feel safer when someone is looking after them. In some cultures, (e.g. India), complimentary, personal assistance for older travellers is identified as important. A frontline employee describes the situation:

> I even see some younger people today, you know, in a frenzy because their connection times ... quite frankly, are all too short. And ... with a delay, it is mayhem. So *for an older passenger this is atrocious* [...] absolutely, so when you have a specialised service like that ... [it] is yes, essential, and it's only going to be more important as ... you know, the gentrification of the travelling public (Frontline1).

This shows that Frankfurt Airport has to cater to the needs of older transfer passengers. For them, the possibility of a missed connection due to a delay can be a great source of stress. However, connecting times have become more important within the industry in terms of a possible competitive advantage. The airport has to ensure that all different types of passengers are able to connect - with or without assistance. Some travellers use FraCareServices to support them through the terminal, to their connecting gate. Others make the trip by themselves, possibly causing delays if they are not able to get there in time. This twofold motivation to ask for assistance is interesting. It is not only due to physical

constraints that people ask for the services of FraCareServices; they do it to feel reassured and looked after on their way through the airport. Interestingly, the abuse rate of people who ask for assistance is currently estimated to be around ten per cent already. A number that is on the rise. (Manager11). Airports and airlines alike need to address this challenge to their operations.

Chang and Chen (2012, pp.535-536) stress that providers have to learn how to cater to the needs of disabled passengers. Their research investigates impaired passengers only and does not differentiate by age. One of their findings shows that airport authorities should consider the offer of more value-added services to enhance that group's mobility. This work's findings identify a complimentary care service in general and wheelchairs in particular as value-added service offerings.

5.3.5 How Automatisation Affects the Travel Experience

Increased automatisation at the airport came up as a central theme within the interviews and the observations. Various new technologies in the passenger process impact the older passenger's experience to a large degree. Kirk (2013, p.165) points out that existing research on self-service technologies at airports 'does not appear to discuss any possible negative effects that may occur through its introduction'. Mostly the improvements to the experience are discussed.

The findings of this work reveal that the attitude towards self-service technology varies. An interviewee summarises the wide spectrum of responses:

> I think there are two groups: there are older customers that can easily manoeuvre through self-service technology, and other customers who struggle with it, that don't have that experience and actually don't want to be pushed through in that way (Manager1).

Findings confirm that the move towards automatisation gets mixed responses from the older travellers. At one end of the spectrum are travellers who are 'overwhelmed' by the new self-service technologies. Performing all the necessary tasks at the airport by themselves represents a 'large threshold for older people'. A certain reluctance to use 'machines' exists:

> Yes, I have to say that with all this 'booking into the machines' I have problems. […] No, I do not know how to do it, but my husband does, yes. I do not know. Our daughter then does it for us. She does everything by computer, the check-in, the night before ... chop, chop. But personally, *if I were alone, I could not do it* (Passenger12).

Work by Howard and Worboys (2003, p.391) shows that self-service technology will only be accepted by customers if 'designed with the customer experience in mind, rather than the cost-cutting justification that is driving much use of automation'. Chang and Yang (2008, p.992) conclude in their study, which examines self-service check-in kiosks, that the 'kiosk function […] could be further customized in response to the preferences of customers segmented by demographic characteristics'. Instead of designing an age neutral process, this asks for a senior-friendly check-in design that takes the group's technological capabilities into consideration.

Many older travellers say that they rely upon help from others, such as their spouse or children, to cope with increased automatisation. When asked whether she uses new technologies, a passenger admits that 'alone I could not do it' (Passenger29). Grandchildren may help out, as the following observation depicts.

> The older couple was travelling with their grandson to Kos. When it was their turn at the check-in counter, the agent told them that 'they need to check-in first at the kiosk'. They only accept the bags once the passengers have their boarding passes. The man said that they 'are not

> familiar with those machines and do not know what to do'. To that the little boy [estimated age: seven years] said: 'Don't worry Grandpa, I can help, I know how to do that - I have done that before'. The couple and the agent smiled at this remark as they made their way over to the check-in kiosk. There an agent was able to assist and the grandson did not actually have to help them. Five minutes later they had their boarding passes in their hands as they got back into the queue for the second time to drop their luggage (Observation43).

In most cases, frontline employees offer help with the new technologies. Agents are on site to guide older travellers through the passenger process. When service staff are available for help, some older passengers are interested in learning how to do it themselves, as the following observation specifies. It took place at the boarding gate for an Airline3 flight to France.

> Airline3 offers automatic self-service boarding at its gates. The passenger was next in line for boarding but then stepped aside when it was his turn, letting all the other passengers (who knew what do) pass him. When almost everyone was on board, he walked up to the agent, who had not noticed him before, and asked for help. He said that he had been travelling a lot on business before but now being retired he does not know what to do there. The agent was nice and helpful, explained how self-boarding works and the man boarded the plane (Observation20).

Howard and Worboys (2003, p.390) point out that it is important that passengers perform activities themselves: 'if […] self-service is presented so as to leave the customer feeling valued and empowered, it will achieve satisfaction, generating positive word of mouth and increasing the likelihood of future customer interaction'. This observation also shows that past travel experiences differ and, with that, the ability to adapt to new technologies. The man used to travel before he retired and is interested in keeping pace with new developments. He wants to learn how to do it by himself. Assistance is appreciated, though.

A few older leisure travellers are afraid of 'doing something wrong' when they have to check-in themselves. Self-service kiosks and automated boarding gates are perceived as difficult. An interviewee explains that '*I prefer personal care.* And this is all about computer now and engineered. Because of this it is sometimes very difficult for older people. Checking-in, for example' (Passenger19).

At the other end of the spectrum of mixed responses are the older travellers who have taught themselves to use self-service technologies. For example, when asked whether she uses check-in kiosks or self-boarding gates when she goes on holiday, a passenger responds with an affirmative 'yes'. Asked about her experience with these new technologies, she states that '[i]t works just fine […]. Yes, it works' (Passenger25). Passenger24 maintains that she has 'No problem, I have no problem with [check-in kiosks and boarding at the gate]'. Passenger28 says that they usually already check-in from home through their computers. They even 'master' the late-night check-in the night before when they travel.

About half of all older travellers interviewed are able to make their way through the airport without assistance at the automated contact points. However, given the option, they prefer personal service. This is in line with Kirk's (2013, p.166) observation that 'opportunities to improve a passenger's airport experience […) will be lost with the addition of self-service technology'. A passenger comments that she would prefer personal contact, the way it used to be, although she is able to check-in herself via the kiosk: 'The way it was before. I find that much better because the other one is not faster […] absolutely. And *the older generation has problems with that*' (Passenger29).

This statement specifies that the increased speed that is achieved by self-service technologies is not so much a factor for older people as it is for other groups - business travellers in particular. It also shows that, in

order to be accepted, automatisation has to lead to perceived benefits. Alcock and Millard (2006, p.72) comment accordingly that when airports introduce self-service technologies they need to decide whether the technology is perceived as an 'attractive experience for the customer or whether it detracts from the overall service experience'.

The following observation took place in Terminal 2, hall D, in front of an Airline7 ticket counter. The ticket agent was trying to find a solution for three women in their 60s who had a problem with their flight booking.

> The women were standing in front of an Airline7 ticket counter and had a loud argument with the ticket agent. They just wanted to check in for a flight to New York but were not able to do so. It turned out that one woman had (she thought) 'bought' the tickets online. This purchase, however, never went through. They all had printouts of an itinerary in their hands but no valid tickets. The three were desperate and close to tears as the agent told them that they would have to repurchase three tickets if they wanted to get on the flight today and gave them the new price. The three went away and discussed it. Five minutes later they told the agent that this was a nightmare for them; they were so much looking forward to going to New York together and they wanted to buy the tickets. The woman who originally thought that she had bought them said, 'I am so sorry, I will make it up to my friends but I learned my lesson - *I will never try to buy something online again at my age'* (Observation37).

In 2014, 9 per cent of all German Internet travel bookings were done by people who are between 61 and 70 years old. Only 3 per cent who are 70 years and older book their holidays online (Deutscher Reiseverband, 2015, p.22). The three women's online experience can be evaluated as poor. The fact that they had no tickets can be regarded as a major if not central distraction from their holiday. Their trust in new technologies most likely is shattered forever. This observation is important as it shows that the acceptance of self-service technologies goes beyond simple usability and efficiency. Throughout the tourism travel chain, reliable technology

plays a central role in the perception of the overall quality of the experience (Alcock and Millard, 2006, p.77).

What all answers to these interview questions have in common is that the growth in self-service technologies is interpreted as being unstoppable. It is acknowledged that it is a necessary part of process optimisation and cost reduction. Some perceive it as a 're-education process' (e.g. Passenger5) or a habituation process. They agree that next generations will increasingly get accustomed to the use of self-service technologies. In the meantime, and until automatisation is accessible to all, necessary help is still provided for the few who need assistance. To make automatisation accessible to them and to meet their requirements, technology needs to be 'humanised', as Sigale (2008, p.220) points out.

A travel agent comments that

> [i]t would be good if you can *spare older passengers from checking-in at the machine*, and you actually offer a staffed counter that is open and where a person sits. That they would prefer. And to whom one hands over his documents, his passport and you simply hand over your luggage. This is certainly a service which is very important for older passengers (Frontline11).

Older travellers prefer human contact to self-service check-in. A 'staffed counter' is perceived as a value-added service element that is 'very important' to a positive experience. Observation25 has shown already that airport security screening causes stress to older travellers. The following observation confirms that automatisation can add additional stress at this customer contact point.

> A new system has been introduced that sorts the passengers automatically (with the help of sensors) into different lines at the security checkpoint. Previously, an airport employee who told the passengers which queue they should join had done this work. The couple does not know what to do when it is their turn to follow the instructions given by

> the system. A traveller behind them gets impatient and tells them to move on. The older man turns around and says, 'I am not stupid, I just don't understand what they want us to do and where we should go'. The other traveller tells them in an unfriendly tone which lane to join. They continue to walk, shaking their heads (Observation35).

The airport has introduced this automated system to make passing through security faster and more efficient. However, in this case, the opposite is achieved. The older man gets stressed and is overwhelmed by the instructions that he receives from an automated system. This observation is in accordance with research by Sigale (2008), who explains the benefits of increased automatisation to be faster check-in, avoidance of queues and smooth travelling through the airport. Sigale (2008, pp.212-220) acknowledges that older passengers may have problems with this development. This work's findings confirm this.

5.4 Conclusion

The findings of the first part of this chapter contribute to a fuller understanding of the airport passenger experience of the older leisure traveller. Despite the group's heterogeneity, they point out some characteristics in their attitudes and behaviour. The freedom to travel, to fly for their holidays, is a measure of older people's quality of life. They are willing to spend money on quality and comfort but this is mostly associated with the experience in the air or at the destination, and not with the airport. This elaborates upon the idea of the 'airport as a destination' (Feldman, 2009), of a 'distinct social space […] that orchestrate[s] new forms of social and cultural life (Hannam et al., 2014, p.173) or an 'aerotropolis' (Kasarda, 2008). It proves, however, that in the eyes of the older travellers they are satisfied when the airport fulfils its role as an infrastructure provider. Interview and observational data stress that the service encounter at the airport is not perceived as a central part of the overall holiday experience.

To make their journey through the airport more pleasant, reassurance and personal attention from airport staff are appreciated. Social interaction is important in the passenger process because it enhances their overall airport experience. In general, older travellers prefer an age-neutral and inclusive approach within the standard passenger process. Most of the older passengers interviewed do not consider themselves to be old. Age alone is not a criterion for their segmentation; interviewees prefer to differentiate between people who are mobile and those who are reduced in their mobility. Special assistance for older travellers is deemed necessary only when disabilities affect mobility.

To gain a better understanding of the significance of the different commercial and non-commercial points of contact (Page, 2005), interviewees were asked to rank them. The findings show that they attach most importance to reliable service provision at the non-commercial customer points (check-in, customs clearance and security screening, luggage retrieval, boarding). The commercial offerings (availability of shops, duty-free goods and associated services) were of little interest to them. The same picture evolved when the empirical findings were analysed with the help of Sykes and Desai's (2009) model of the airport experience. The airport's reliability and efficiency in its infrastructure and operations were ranked first.

Any kind of help is greatly appreciated that eases the way through the terminal. The findings revealed further that older leisure travellers are price-conscious. At the same time, they are of the opinion that commercial offers at the airport are too expensive. Use of the retail facilities is accordingly low and few interviewees consider paying extra for increased levels of service quality in the basic passenger process. The layout of the terminal buildings, long walking distances and the need to negotiate different levels around the buildings pose problems for older leisure travellers. Many perceive the atmosphere as stressful, hectic and crammed which confirms that older passengers suffer from a higher level of anxiety, and as a result thereof, stress within the airport environment.

The second part of the chapter examined the question of whether older leisure travellers need special treatment in an airport. The analysis of their expectations of their experience shows that little involvement with the airport product exists. They mostly expect the airline, not the airport operator, to take care of their needs. The standard provision of the passenger services caters sufficiently to their needs. They attach importance to a personal and friendly service. Satisfaction with Frankfurt Airport is high among older travellers. This confirms research by Ganesan-Lim et al. (2008) who observe that older customers tend in general to be more satisfied.

The air transport industry's drive towards automatisation came up as a central theme within the interviews and observations. It affects the airport experience of the older traveller to a large degree. Their attitude towards self-service technologies, however, does vary. Some perceive this development as unstoppable because automatisation is part of process optimisation and cost reduction. Some older travellers are able to use the automated processes. Others rely upon help to do so and state that they have problems with the 'machines'. Growing automatisation within the passenger experience is acknowledged to be something people will get used to.

The impact of automatisation on the service experience is an area in which further research is needed to understand this rather complex relationship and how it impacts social interactions (Kirk, 2013, p.173). This work's findings offer a preliminary understanding of how older people accept self-service technology and react to the many technological advances. In particular, given the older group's wish for personal service and human interaction, a comprehensive understanding of older travellers' expectations in that regard is important for the future successful design of infrastructure and processes.

In summary, the findings on the demand side demonstrate that the standard passenger process works for older leisure travellers. The current airport product - including the special services for mobility-reduced passengers - meets their needs. The expectations of the older leisure travellers of this part of their holiday are low. Neither do they ask for nor do they require any special treatment. Their overall airport experience, however, could be enhanced through the offering of additional services.

6. DISCUSSION OF THE RESULTS ON THE SUPPLY SIDE

6.1 Management's Reaction to the Older Leisure Traveller

Demand for air transport services creates management problems at airports where capacity is scarce and terminal, facilities and runway space is limited. Passenger comfort, service quality and the overall airport experience are affected. As the previous two chapters have shown, Frankfurt Airport, like other European hub airports, is challenged not only to accommodate rising passenger numbers but also changes in its customer base. To fulfil its emerging role and meet future challenges, it needs to provide appropriate infrastructure together with efficient operations. Chapter 5 has discussed the research's empirical findings on the demand side. This chapter now takes a look at the findings on the supply side. In answer to the third research question, it explores how airport management is responding to population ageing.

The following sections summarise findings that capture management's awareness of and reaction to older leisure travellers. Section 6.2 examines the effect of population ageing on management's future strategies and operations. Collected data is discussed that indicates whether older passengers are considered to represent a business opportunity or a challenge. Section 6.3 describes the role of an airport in greater detail, with an emphasis upon the airport-airline relationship and an airport's competitiveness in terms of basic and premium factors. The chapter then discusses whether the role of an airport can be interpreted to be one of an infrastructure provider, a service provider or a service experience provider. Its role as part of the overall tourism travel experience is summarised. In Section 6.4, the conclusion highlights the key findings and reflects back on the literature.

6.1.1 Awareness of Older Leisure Travellers

Thompson and Thompson (2009) contend that few organisations in the European Union manage to adapt their service offering to older customers. They think that marketing must accommodate the

> entirely different and more complex older consumer base, during which the role of promotional activity is likely to diminish, while that of other marketing components increases, especially those relating *to improve service, value and loyalty* (Thompson and Thompson, 2009, p.1286).

Before evaluating how Frankfurt Airport adapts its service offerings to these marketing components, it needed to be established to what degree management is aware of shifting demographics and their possible effects on FRA. Interviewees were asked whether population ageing affects their business. The findings show that management acknowledges population ageing's significance for airport business. As one manager puts it: '*The elderly and their mobility will affect us much more in the future'* (Manager6).

Managers are further aware that they are only slowly learning about population ageing. A senior manager explains from his perspective the demographic development that is taking place:

> That is not a development that is realised in jumps - it is more of a gradual change, where there are always several counter-trends and movements. In general, it is widely acknowledged that people are getting older in Western countries. […] *it's a slow process*. Then one day in 2015, 2030 it will gain in importance [...] Very much so then because all the baby boomers will retire […] the big question is, and that is *the big strategic question* of how companies *can make the most* of this huge mountain of baby boomers who will *then stand at the door* (Manager10).

This shows that Frankfurt Airport is aware of population ageing. As a major societal trend it will impact future strategies. The statement also

indicates that this manager is aware that the airport has to address this challenge. Strategies need to be prepared, so the airport knows how to 'make the most' of the influx of older people in the future. It has to prepare infrastructure and processes for the future. The interviewee goes on to explain that various major trends will affect each other and population ageing cannot be looked at in isolation:

> At the same time the environment is changing, we see attitudes change towards life […]. Ten or 15 years ago it would have been impossible, or nearly impossible, for people who are over 65 to get on a plane. Today it is normal. As a result, I think we must not make the mistake, to project the past ... into the future in this area. It is too simple to say, I look at how it was in 1980 and simply project that into 2040. The way we are going to travel is going to change very much. How we use airports and the issue of demographic development is a factor that is *very difficult to isolate. We cannot generalise* and say yes or no*. It is a societal trend that will have an influence* (Manager10).

This statement shows that population ageing is on the airport operator's agenda. It shows that comments by Patterson and Pegg (2009, p.267) can be confirmed. While organisations 'have begun to appreciate more fully the sheer size of the market numbers involved, it also has much to do with the recognition of the diverse lifestyle patterns and consumption habits of this cohort where the "one size fits all" mindset just does not cut it'. This comment by Patterson and Pegg (2009) relates to tourism agencies and not to airports which indicates that the airport's role in the travel value chain has to be examined separately. It contradicts Brilha's (2008) comment that airports have found their role in the tourism value chain.

Manager10's statement stresses that a nuanced approach is required, as ageing cannot be looked at in isolation. The demographic change that takes place is identified as a major trend that impacts not only society and travel but also future business. Strategy and marketing are 'working

on it […] and try to project how we are going to deal with this […] very large group of older people', Manager10 confirms.

6.1.2 Acknowledgements of the Group's Heterogeneity

The findings from the interviews reveal that the airport operator has problems with the identification of common characteristics:

> Originally, we wanted to have those as a target group, but it turned out ... [Pfff]. It does no good because *it is such a heterogeneous group* that is like having to sub-divide the whole passenger group once again (Manager10).

Despite some efforts on behalf of management to categorise and generalise, the heterogeneity among older leisure travellers is emphasised throughout the interviews and also becomes apparent in the observations. The issue, however, has to be approached carefully; to generalise or stereotype the older traveller is wrong. As the World Health Organization (2015a, p.3) points out, there is no 'typical' older person. Two statements serve as examples of how the group's heterogeneity and diversity are perceived. 'They are *so heterogeneous*, sometimes needy, sometimes less; sometimes they are fond of the airport, and sometimes they are not' (Manager16).

> This is very, *very diverse* […]. And a 65-year-old can still be very fit and does not need any help. Then again, they may be handicapped and will need adequate help. This can be very different (Manager14).

Those two statements signal that the group of older leisure travellers is difficult to segment, as they are distributed among other market segments (Section 4.3.4). Manager16 sums it up as 'older customers are just about being discovered […] *this group is unfortunately very heterogeneous*'. Another interview confirms that the airport is in its early stages of learning

about the group's heterogeneity but acknowledges its future impact on its strategies:

> Well, I do think that *this has an impact on our business*. [Ehm] […] *things will change;* they [strategies] have to be aligned with this enormous demographic shift in terms of infrastructure, in terms of sales, [ehm] in terms of services. They have to be designed strictly in line with the needs of these [uh] older people, who are mobile, yes, perhaps even generate additional business, who may even fly in business, in addition to the joy of their retirement life [...]. Or, let me put it this way, who are already restricted in their mobility, in whatever form, whether this is difficulties in walking, visual impairment or other disabilities and have problems finding their way all by themselves through Frankfurt Airport (Manager6).

While the older passengers are diverse, they can be broadly grouped according to two basic criteria: those who are mobile and those who are reduced in their mobility. Subjective age is assessed differently from their chronological age (Patterson and Pegg, 2009, p.264). Age is not a factor in itself. It is, rather, the personal level of fitness that matters, i.e. their level of mobility. This is in accordance with their self-perception (see Section 5.2.2).

6.1.3 Approaches to the Group's Segmentation

Because of this identified heterogeneity of the group, management argues that there is no need to segment passenger groups based upon age. The findings reveal that, so far, a differentiation based upon age is of little interest to management.

> I think we have a variety of segments, regardless of age. Because intention to travel and the justification are not dependent on age. Yes, when I travel on vacation, I'm different and I expect different things from my airport than when I am on a business trip. And even in old age, people still travel on business. What do I know if he wants to sell his home in Majorca, I do not know that ... maybe he then has other

> demands of the airport as when he flies to Andalucía to play golf? [...] And to filter these customer segments, to say what exactly what they expect, what their attitudes are, what they expect from the airport, where opportunities lie, what are the risks, how can I generate what with that business? All airports are at the very beginning in that respect. We also note that every airport is a *little bit into experimenting* at the moment. Many do much; we also do that. In order to see *how I position myself* in this world (Manager10).

This statement shows that airport management has difficulties describing the older leisure traveller in greater detail. Chapter 4 has elaborated upon the difficulties of segmentation. The fact that little specific (quantitative and qualitative) marketing data exists on the group makes it even more difficult. Notably, Manager10 states that airports are in the 'experimenting' stage in learning about older people. This endorses the findings in the literature review that a comprehensive approach is missing that allows for an understanding of the airport experiences of older travellers. Strategies are not formulated yet.

6.1.4 Age-Neutral Passenger Processes

Interview data reveals that the airport operator is examining the effects on strategies and operations (i.e. its passenger process) further. The first steps to learn about population ageing have been taken through the PASS project (described in detail in Section 4.3.6.3). Findings reveal that among managers an awareness exists that an airport '*cannot address elderly people with products for the old'* (Manager10). This reflects back to the call for age-neutral service offerings (Kohlbacher and Hang, 2007). Older passengers do not want to be singled out; they ask for an inclusive approach rather than age-specific customised offerings. Kohlbacher and Hang (2007, p.18) warn that organisations that do not cater to changing market demands and adjust their offerings accordingly will fall behind.

To have age-neutral service offerings in place does pose problems when it comes to the area of self-service technologies. Chapter 4 and Chapter 5 have discussed the reasons why airports push for increased automatisation in their processes. The findings of those two chapters, however, have also indicated that the majority of older people does not prefer self-service technologies over personal service. Management is aware that the skill levels among older travellers do vary.

> The typical 70-year-old from a decade ago, the one who does not find his way around the airport, that one no longer exists [ehm]. *When people grow up with technology, it is also normal for them to use them as they age. This will be the big trend*. Then of course there are a smaller number of people and they will always have physical disabilities, limitations, they think that they cannot handle it any more. And of course you must cater to their needs. You have to put together packages for them. I also believe that this is possible at larger airports; we're working on that. We go to them individually and ask, what is your problem, how can we help? However, I do not think that this will be the majority of older people. I think that *in 20 years from now, we will see many older people who have the technical ability to innovate. Because they're simply getting used to that* (Manager10).

Management and frontline employees understand that older people have problems with increased automatisation within the airport environment. Not all older people know how to navigate within an automated airport environment and would prefer personal service. However, management assumes that, eventually, all passengers will get accustomed to self-service technologies. They push for an age-neutral design in the passenger process; and do not explicitly address older travellers' needs in the move towards greater automatisation in its processes.

6.1.5 Getting Ready to Deal with Population Ageing

The research tried to find out if the airport is getting ready with its infrastructure and processes to accommodate the needs of older

travellers. In response, one manager notes that how airports deal with older passenger will increasingly be ‘an image issue’ (Manager12). This reflects back to Table 4-4 on the comparison of the performance of European Airports (Handelsblatt GmbH, 2011). The image of an airport is judged upon how it performs in the category of the soft factors of its service provision. This interpretation goes back to the airport’s original task, as an enabler of mobility for a travelling society. Airports cannot afford to treat older people badly. A senior-friendly positioning will gain in importance. One interviewee, however, admits that this aspect is not yet on the agenda: ‘*The elderly passenger is not yet in focus, but I am convinced that it will come’* (Manager14).

When asked whether the airport does already notice changes in passenger structures due to shifting demographics, a senior manager answers that the airport operator notes two trends.

> If they are no longer part of working life, they travel less. [Ehm] That is more of a negative trend. A positive trend is that we see in previous years that the frequency of travel increases with older people very much. And that they are willing to use the aircraft as a mode of travel then (Manager10).

This remark is confirmed by findings reported in Section 4.3.5. The study by Intraplan Consult GmbH (2006, p.7) showed that travel frequency among the working and non-working population differs when they decide on their preferred mode for leisure trips. Once people turn 61 and approach retirement, 15 per cent take the aircraft to go on holidays. While they are ‘willing to use the aircraft’, other modes of transportation, like trains and busses, then gain in popularity.

A manager discusses in more detail the impact of older people travelling by aircraft for their holidays. She confirms that

> it has an impact on our business. Right now it is such that the average age of our passengers is 40 years. In recent years, however, from 2006 to 2012, for example, the proportion of business travellers has declined from 55 per cent to 45 per cent. We cope with this shortfall through an increase of leisure passengers, mostly travelling privately, who are transiting here but also by an increase of leisure passengers who originate from here. In German society, the Germans make up about 50 per cent of all our passenger growth; a growing proportion of this are older people. [...] *We have concluded that our proportion of elderly passengers grows disproportionately. That is, their share in the older population is increasing, but among the travellers that we get here, the proportion is not as much as in the population.* [...] I think that it is known that *the proportion of elderly passengers is comparatively low* (Manager12).

Section 4.3.4 has shown that the share of leisure passengers passing through Frankfurt Airport is growing (Fraport AG, Markt- und Trendforschung, UEW-MF, 2015c). However, this statement shows that the share of older people is not increasing in proportion (see Table 4-9). If this development turns into a trend, it may have major impacts for the development of Frankfurt Airport's passenger structures. Passenger numbers may not grow or even decline if fewer older people decide to fly. In a competitive environment, the airport operator has to ensure that it attracts older leisure travellers to benefit from future passenger flows. No other statement was found that the airport considers this development a major challenge. This is significant because of the rising passenger numbers (Table 4-5) and the overall positive development in air travel (Section 4.2), more older passengers - in absolute numbers - travel through Frankfurt Airport.

6.2 Business Opportunity or Challenge?

Oxford Economics is a commercial consultancy. While it provides economic forecasts for a variety of industries, Oxford Economics (in partnership with the industry IT provider Amadeus) has also investigated

the future competitiveness of the air travel industry. It calls for the exploration of the new business opportunities and for better management of the complete traveller experience (Oxford Economics, 2010, p.14). Its work concentrates on the rise of ancillary revenues that are generated by airlines (e.g. passengers' willingness to pay for better seating and superior meals on-board the aircraft). It states that passengers are willing to spend money on improved services and help. Furthermore, it proposes that airlines and all other service providers involved in the passenger process should focus on the demand for their underlying product and add value through the creation of holistic travel solutions (Oxford Economics, 2010, p.27). Previous findings have indicated that the ageing of population may increasingly pose problems to the smooth running of an airport's operational processes. The rise in numbers of older passengers who journey through the airport could represent a challenge to its future operations if value is not added through 'holistic travel solutions' (Oxford Economics, 2010, p.27).

This section turns to findings that investigate whether, in the eyes of the interviewees, older people are perceived as a challenge or as a business opportunity. In particular, the growing share of private travel at Frankfurt Airport (Fraport AG, Markt- und Trendforschung, MAR-MF, MSG-MV, MVG-MR, UEW-MF, 2003-2013) suggests that a business opportunity may exist for additional services that appeal to leisure travellers. According to Brilha (2008, p.173), leisure travellers are attractive for the airport because they have more time, less restricted travel plans and are interested in experiencing services. This argument is supported by Patterson and Pegg (2009, p.257) who argue that '[w]e now live in a world where tourism and leisure experiences are now being increasingly catered for by the commercial sector'. There is thus an opportunity for management to generate revenues with leisure travellers in general. However, Chapter 5 has indicated that this does not necessarily hold true in the case of older leisure travellers.

6.2.1 Generating Revenues with the Older Leisure Traveller

First of all, all airline personnel interviewed perceive population ageing as a business opportunity. A flight attendant notes that 'with the airlines the trend is there, that they reclaim the customer' (Frontline4). This trend was not noticed among airport managers. Another airline manager thinks that the business opportunity primarily lies with older travellers' greater financial and seasonal flexibility in terms of the core service, i.e. the ticket and its price. He argues that older travellers are an 'economically attractive target group' for all participants (airport, airline, external provider, travel agent) in the 'process chain'. Due to their flexibility - in terms of money and time - older travellers can travel off-peak and fill airline seats that otherwise would not be sold.

> The older passengers are also an important, central group, which for us as an airline is not uninteresting [...]. Yes, because this group is *not tied to any holiday season*, they are usually at a stage in their life where they have some *financial flexibility* and thus there is the *opportunity for us to gain actually a higher return* [...] as a field for extra business. Yes, that's an additional business either for the airport itself or for an external provider that can offer this service. Also, again you can promote that through travel agents. You can already offer that at the beginning of the process chain (Manager8).

One has to differentiate though. The following observation took place in Terminal 1, hall A, first at the business and then at the economy check-in counters of Airline3.

A couple was observed who were in their 60s.

> The couple arrived with their suitcases at the business class check-in. They were going on a Silversea Cruise out of Boston as the woman told the check-in agent. The agent looked at their tickets and told them they were flying in economy and that they had to go over to the queue for economy. 'Oh come on, we spent 10,000 euros on the cruise and you

> cannot make an exception and check us in here?' the man asked. The agent insisted and they went away to join the other queue. The woman said to her husband, 'Calm down; she is just doing her job and the fact is we decided to spend our money on the holiday and not on the flight' (Observation48).

At first, this observation can be interpreted as a possible business opportunity for both the airline and the airport. The couple goes on an expensive luxury cruise. They themselves think that they are eligible to check in with the premium service (business class). The check-in agent tells them that they are in fact not entitled to check in at her desk but have to go over to the automated economy class check-in. This annoys the man as he perceives the holiday in its entirety. He asks for 'holistic travel solutions' (Oxford Economics, 2010, p.27). His wife, however, clearly distinguishes between 'the holiday' and 'the flight'. This clear distinction between the airport experience and the holiday experience limits the realisation of possible business opportunities. The fact that they have money does not necessarily mean that they are willing to spend it at the airport or with the airline. They clearly distinguish between the transport and the tourism parts of the overall holiday experience. As a result of this observation, the question of whether a business opportunity truly exists needs to be explored further.

It is mostly frontline personnel who think that older passengers might be willing to pay for services that make their travel easier and allow for greater convenience.

> [P]eople are now accustomed to paying money for service, whether it is the moonlight or early check-in or otherwise. And I am sure that an elderly passenger is willing to pay money for it (Frontline11).

This statement indicates that there might be a business opportunity for airports to develop services because people get used to having to pay for auxiliary services. An interviewee explains further what role auxiliary

services play in the move to differentiate the service offering and to appeal to different segments of the market in the future:

> *We know airline business at the moment is all about auxiliary, auxiliary services and you know you pay extra for extra need*. You pay extra when you have an extra bag because it costs the airline extra to handle the bag, to handle lost baggage ... the same goes for extra seating, you know, you need more leg room? We provide extra legroom seats at extra cost. And there is going to be a whole portfolio for the future of services […] on the service side for [ehm] elderly customers who may not want wheelchair service but electric cart service […]. I could see that if you offer something like that a lot of people would actually pay the extra 50 dollars. You know, to make sure that they get onto the electronic cart. They would actually be the first at the security lane (Frontline5).

Similarly, an interviewee notes that:

> [Older travellers] will be prepared to pay for it if they are well looked after. Yes. Although I must specify that a bit, I do not want to narrow down this clientele to older people. There is a group of people who say 'pffff', I can do everything myself but I am willing to pay x euros if someone does that for me. Yes. And to get *the airports to initiate new services, to generate them, that is I think the great opportunity for airports* (Manager10).

One interviewee is of the opinion that a transfer service could be a 'cash cow' for the airport. She is of the opinion that it is 'absolutely reasonable that you charge extra for such a service'. She continues to explain that a business opportunity for additional transfer services exists:

> it will turn into value creation because these elderly passengers who are mostly from the Middle East and from India would be ... the families would be willing to pay the extra because they will know that the extra service is there. They would send them there ... and really I cannot stress this enough. That if personal attention is given there and it's reliable and consistent every single time*, it is going to be a cash cow* (Frontline1).

A manager describes other possible business opportunities in more detail.

> [T]hat begins with the porter service, picking up at departures but also at arrivals but I think that this is also the issue of personal care, personal guides, lounges, an area where I can find some peace before the flight starts, etc., etc. Since in any case, in my view, there is an economic potential to be found in this (Manager5).

6.2.2 A Challenge to Existing Approaches

Some interview data points out that doubts exist about whether there is an actual opportunity to make money with older leisure travellers. One interviewee asks for more research on the question of how much older passengers are willing to pay for that 'event' at the airport.

> To them it is exciting; for older people it is almost *an event*, whereas for the businessman, you know, it is more like taking the bus. So, I would really like to see some research being put into that group and also how much money they are *actually prepared to pay* for that service (Manager2).

Management is aware that flying mostly has become a commodity (see Section 2.6.1). Differentiation is based mainly upon the class of travel. Older people, in contrast, still associate flying with something special, 'an event'. This explains why management is unsure if this means that revenues can be generated with that customer group, i.e. if they represent a business opportunity or not. A senior manager is also more critical.

> I would really have my doubts that it would be a business opportunity for an airport or for whoever, to offer an additional service. [...] Well, I would pack three question marks behind the question, whether there can be an additional business opportunity to offer an additional service (Manager11).

This statement stresses that it is a challenge to position an extra service offering for older passengers on the market. While FraCareServices offers possible elements, like shuttles, wheelchairs and transfer services for free, it is difficult to define additional services on the ground that older passengers, in light of their price-consciousness (as shown in Chapter 5), are willing to pay for.

Chapter 4 has pointed out that Frankfurt Airport enjoys a good reputation worldwide as a hub airport because of its fast transfer times. With a share of about 55 per cent in transfer passengers (Fraport AG, Markt- und Trendforschung, MAR-MF, MSG-MV, MVG-MR, UEW-MF, 2003-2013), the quality of its operational services is of particular importance.

> *It is about making money.* Like most of the passengers who have to change planes, they [older passengers] want a process that is easy, that you get to the plane without stress, though *I have to run through a giant shopping mall* (Frontline4).

Retail is perceived as an obstacle to the basic passenger process. A service that circumvents the shops and guarantees a reliable connection can be of such value that passengers may be willing to pay extra for it. This is an interesting point in times of increased, sometimes forced commercialisation. Instead of being made to consume, a certain group of travellers might be willing to pay a surcharge for not being bothered by retail offers. This represents a business opportunity in its own right.

6.2.3 Areas of Concentration

The findings on the question of whether older people represent a business opportunity or a challenge show a diverse spectrum of answers. In particular, it is of interest that a business opportunity may lie not so much with creating additional services but with making people pay to circumvent the standard processes, easing their journey through existing infrastructure. The majority of interviewees agree that ageing could pose

a challenge to operations and the smooth running of the standard passenger process when their numbers rise in the future. There might even be a business opportunity to cater to the specific needs and demands of older passengers at the airport, but a clear differentiation is necessary. In particular, the additional, non-complimentary service offerings need to be specified against the free service for passengers with reduced mobility.

With this, the question arises of how management can prioritise the different measures that can be taken to meet these changing needs of its customer base. What areas are of significance for the airport experience of the older leisure traveller and which ones are just nice to have?

> I can say at every corner of the terminal what bothers me as an older man but the question is what points are significant? *One cannot redesign the whole terminal [...] we have to focus on those that are really important.* Perhaps it is this *baggage issue* but it might be also other topics (Manager10).

According to Popovic et al. (2010, p.8) airports are concerned with two main things: 'the passengers themselves and the things that passengers carry' (i.e. 'this baggage issue'). These two basic factors reflect back to the airport's role of an infrastructure provider. This pragmatic approach by management is confirmed further. Graham (2014, p.174) specifies that airports should prioritise measures to improve the service experience:

> improving areas with low service quality scores may not necessarily improve overall satisfaction and meet passengers' needs. Quite simply, the best way of achieving this is by focusing on areas that are regarded as less than satisfactory, but at the same time important to the customer.

Thus, an airport operator should concentrate on improving service quality in the areas that influence satisfaction and contribute to an overall

positive airport passenger experience the most. The findings on the demand side in Chapter 5 have identified some of those important areas in the eyes of the older leisure traveller. The findings in this part have elaborated upon them further.

6.3 What is the Role of an Airport?

With regard to the question of how airport management responds to population ageing, the present research also investigated the broader role the airport plays for the overall holiday experience in tourism travel. According to Tretheway and Mak (2006, p.6),

> [t]he airport is the tourist's first and last experience with their tourism destination and that experience can have a profound effect on their overall tourism experience and the memory that is implanted of that experience.

In this statement of the airport's role, Tretheway and Mak (2006) refer to the destination airport, not the home airport. This clear differentiation is in line with the observation that tourism research mostly concentrates on the experience at the destination but not on the overall travel experience from beginning to end (Benckendorff and Zehrer, 2013).

What role does Frankfurt Airport play in the eyes of the interviewees who depart from, pass through or arrive there? The findings reveal that this role is mostly associated with the reliable provision of the core airport product (including passenger services) and the tangible product (including the infrastructure) (Halpern and Graham, 2013, p.119). Research findings on the airport's role differentiate between commercial and non-commercial offerings.

Among the management interviewees, it is agreed that all commercial offerings at Frankfurt Airport have gained in importance. This confirms that commercial activities gradually find their way into an airport's

strategies (Graham, 2011, p.5) and with that into the interpretation of its role. Airports focus on the generation of revenues in the retail sector. In answer to the question of whether economic requirements prevail in today's role of an airport, a manager replies that the airport has no choice but to take the path towards becoming a shopping centre (Manager7). Increased commercialisation is perceived to be unavoidable. The generation of retail revenue is a must for the airport operator. From management's perspective, shopping is part of the airport experience. Airports have no choice other than to increase their commercial offerings. They can no longer rely upon the landing fees (paid by the airlines) to finance their infrastructure and service provision.

> Yes, I think that airports must remain [shopping] malls. Because airlines always drive the rates down further, so the *airports are not making money with air traffic any longer and they have to earn their money in a different way* (Manager13).

This is of significance because older people contribute to an increase in passenger numbers, they are of interest to 'high-margin retailing at airports' (Starkie, 2012, p.48). The challenge is to turn them into shoppers. At the same time, the interview data shows that management is aware that the shopping experience cannot interfere with the provision of the basic passenger process, i.e. the provision of efficient infrastructure and processes. An interviewee elaborates upon the tension between those two roles of an airport:

> It depends of course on the strategy of the airport operator. Either it wants to run the airport as a pure infrastructure provider [ehm] or as an airport with an attached shopping mall. Most of the *shopping centres are only a means to an end, to cover the cost of the infrastructure,* which generally do not cover costs, and then they need to compensate for that. For the passenger, of course, this has the advantage that you can do some things at the airport. Like now ... last-minute purchases that otherwise would not be possible [uh] that means that it is really

> something for everyone. Passengers get the service and the airport can [uh] help … finance its infrastructure (Manager3).

Commercial revenues contribute to financing the non-commercial service experience. From this perspective, airports and passengers alike benefit from increased commercialisation. The shopping experience contributes to a more pleasant overall atmosphere at the airport while revenue is generated. This is an indication that some airport developments and the improvements in infrastructure are driven by privatisation and the resulting increased commercialisation (Ison et al., 2011). Frankfurt Airport, like other airports, has to invest continuously in its infrastructure. Its task is to maintain and develop the site.

> Yes, infrastructure provider *... infrastructure operator but let's say also ... to create, to develop, to develop a site where the journey begins*. Yes. And what is the beginning of travel? I go there and there begins my journey. The journey begins at the airport. That is why they travel and the actual experience is one aspect of it. But also getting prepared for the trip. Everything that goes with it. That will not change greatly in the future (Manager10).

This is in line with the view that the airport is an infrastructure provider for transportation. It takes care of passengers and their luggage (Popovic et al., 2010, p.8). Increasingly, though, it is also on its way to being part of the overall holiday experience. Nonetheless, when asked about the role of the airport, many interviewees think primarily of the provision of non-commercial offerings within the standard passenger process. These non-commercial offerings are subject to widespread automatisation. The airport operator's role is, then, to align the different needs in its customer base when it comes to designing and implementing those technologies.

> This has something to do with the airport operator and how they deliver and consider services. [Uh] I agree that most major airports today rather ori... have an eye on the younger customers. [Uh] Often online check-in, self-service check-in [is] available. Machines, they do not cater to the

> needs of the older customers who have inhibitions using this technology and are facing difficulties with that. And perhaps they do not feel comfortable there, standing in front of a kiosk having to print out their boarding passes there themselves because they rather prefer the personal contact (Frontline4).

Balancing the needs of different customer groups is more difficult because passengers get more demanding (Graham et al., 2008, pp.1). They ask for services that address their needs in an appropriate and individualised manner.

> The airport world, that is all the major airports, their thinking is *as much differentiation as possible and as little personal service as necessary.* This is the credo of the future. And especially for older passengers the second point is important [Uh] when I need help, I need to get it, too. Everything, the rest is automated (Manager14).

This statement underlines that airports are under pressure to fulfil expectations and align their service offerings with those of their primary customers, the airlines. Passenger segmentation takes place in form of the ticket purchased, while additional or different offerings on the ground only supplement the core offering, i.e. the flight product. Increased automatisation due to cost pressures drives the development of non-commercial service offerings. Many strategic decisions on future development are driven by the strategies of the airport's primary customers, the airlines. This warrants a further exploration of this relationship between airport and airline because it has an effect on an airport's role.

6.3.1 Seamless Service Provision

Managers and frontline employees were asked to comment on the relationship between airport and airline. Furthermore, older travellers

were asked whether they are aware that different kinds of service providers work together at the airport.

Research by Bergadaà (2009) shows that it is primarily the airlines (and not the airports) that maintain the actual relationship with the passenger. Interview data confirms this. The older leisure travellers often do not distinguish between the different service functions, as the following statements emphasise. ‘You don’t know if that is service staff or someone working for an airline’ (Passenger20). ‘There was a friendly lady there - now I do not know, was she employed by Lufthansa or by Fraport? - who helped me’ (Passenger14). ‘They’re all airport staff to me’ (Passenger3).

Management and frontline interviewees are aware that passengers differentiate little between who provides the actual services. They acknowledge that it is difficult to distinguish between the various authorities and airport staff, and government personnel. Passenger9, however, signals that she is aware that there are different service providers and she does differentiate:

> I think when you have something that annoys you and you have an Airline3 ticket, then you tend to generalise a lot. This is Airline3’s fault now, even if this part might not be Airline3 at all.

This shows that travellers wish for a service without breaks in delivery and disruptions. Throughout the interviews, the concept of a seamless service provision emerged. Travellers do not differentiate between who provides single service elements within the passenger process; they expect all providers to work together to ensure that they can fly as planned. To achieve this, a well-functioning collaboration among different service providers is deemed necessary (Popovic et al., 2010, p.1).

> If you would like to offer a seamless service, then all the passenger processes in the terminal play a role. For example, you also have to work together with federal police and customs (Manager7).

While the importance of seamless service provision in today's airport experience is acknowledged, on a different level this is also of significance to the overall holiday experience. With that, the airport experience becomes part of the tourism experience. A manager explains that breaks in service delivery throughout the whole holiday journey may pose problems to its airline, if not fulfilled to the expected standard.

> They stay at four or five-star hotels and expect a superb service from the airline. [Ehhh] Not necessarily an experience where you feel processed and ... through self-service check-in or automated boarding for example. They tend to look for the *personal touch* and first of all recognition […] *for us as a premium airline, we have come to the understanding that the customer experience is just one of the deciding factors* (Manager9).

Two industry examples illustrate this changing customer experience. Besides increased personalisation, technology plays an important role in this development. While British Airways aims to enhance the in-flight customer experience with mobile technology used by its cabin crew to address the passenger individually, KLM offers a social media-based seat selection programme (Neuhofer and Buhalis, 2014, p.135). The statement by Manager9 stresses the growing significance of an individualised and personal customer experience. For premium airlines, the idea of seamless service provision is important. A flawless running of all processes is a prerequisite for a service delivery, without any breaks. And for that they need the airports. An airline can offer an adequate service on the ground only when the airport has the right infrastructure and operational processes in place. If airlines increasingly wish to offer a 'memorable event' (Pine and Gilmore, 1998) within the airport environment, then airports are challenged to make adjustments to the role they fulfil. The provision of undifferentiated and age-neutral infrastructure or services might not be enough in the future. Airports will be asked to provide satisfying service experiences to their joint customers. Airports may have to adapt their strategies in order to cater to the needs of their primary customers, the airlines.

> *These different services just have to work hand in hand.* That there are no barriers, that these service providers who serve the guests, […] that they are as motivated and friendly with the guests as we are at Airline3. Because customers often do not know that this is actually another company (Frontline10).

Seamless service provision therefore is crucial because 'it is the experience in the airport. It should come from one source' (Manager7).

6.3.2 Conflict of Interests between Airport and Airline?

While travellers wish for a seamless, trouble-free experience, the findings reveal that the relationship between an airport and the airlines can be a source of varying and conflicting interests. In daily operations, the interests of the different service providers' frontline staff sometimes collide, although, in general, frontline employees collaborate well. The conflict of interests between airport and airline management, however, is acknowledged to be greater. This in particular holds true when an airport's revenue-generating activities (primarily in retail) conflict with the operational goals of the airlines.

Airports increasingly focus on their commercial activities; the retail sector is of utmost significance in generating revenue (Graham, 2011, p.5). For an airport operator

> like BAA or Fraport, then, this is certainly where the margin lies. From an airline point of view, the shopping experience can be part of the overall travel experience but it is not, from our point of view, an essential must-have (Manager9).

A manager provides some background information on the airport's move to expand commercial offerings. Frankfurt Airport

> […] *is becoming a major shopping mall* […] we earn our money by increasing the retail business. […] Airports will have to do that in order to earn money, so to speak. In order to maintain their position; run the ancillary businesses; real estate and retail, this is a must. On the other hand, it must be done in such a way that even the *basic process* is important; they want to get onto the plane (Manager12).

This statement shows the airport's dilemma between being a public infrastructure provider and a commercial organisation (Baker and Freestone, 2008). The 'basic process' is impacted by the re-designation of some of the infrastructure as 'shopping mall'. The key objectives of an airline are simple in that respect. Manager2 states that the airline's value proposition is to offer 'a reliable schedule, safety, courtesy, on-time performance and that the luggage arrives'. These needs can be satisfied when the airport fulfils its role as an infrastructure provider with a basic passenger process in place that works well. A manager elaborates upon the conflicting objectives of its major airline customer:

> Well, *the big motivation for Airline3, of course, is simply the cost savings when they cut down personnel.* To reduce the passenger service personnel completely. All to be replaced by machines - those are much cheaper. And thus save costs. […] This is no service aspect, it's just economics. Well, these principles obviously only hold true for the normal economy-class passenger. Business and first-class passengers can still choose what they want […] and it is all about *how to shorten his time at the airport* (Manager7).

This statement underlines the co-dependency of an airport and an airline. Operational processes are redefined to increase automatisation and reduce personnel costs. It is understandable that, due to this, potential conflicts of interests can arise: 'There may be a discrepancy between the welfare-optimal and private airport behaviors' (Zhang and Czerny, 2012, p.30).

And the passenger is in the middle of this tension. Airlines do not participate (yet) in the revenues that are generated in Frankfurt Airport's retail business. As a result, they have no interest in the passengers spending time shopping. Their motivation is to have the passengers at the gate, ready for departure. Thus, the airline's aim is to get the passenger through the airport buildings and onto the aircraft in the most efficient and fastest way possible. These two objectives collide with the airport's interest in having passengers spending money in the retail sector. The manager continues to explain the reasoning behind Airline3's strategy:

> The *philosophy of Airline3 for the future looks like this. The passenger gets to see the first Airline3 employees at the airport [uh] when he sees the crew on board.* The passenger should, if possible, check in at home on the Internet himself; should then print his baggage tag at home and attach it to his own baggage. Then, the baggage is picked up from any kind of delivery service at home and brought automatically to the airport, transported further from there. As a result, the passenger passes through the automated control as quickly as possible and only then if he gets on the plane, he is greeted by the friendly Airline3 crew (Manager7).

Within this scenario, the first point of contact for the passenger is on-board the aircraft. The airport experience does not play a significant role in the overall holiday journey. The infrastructure is there only to allow the aircraft to land and to take off while the passengers can embark or disembark. Thus, the airport is primarily an infrastructure provider. The airline is in charge of the flight product.

An airline sales manager thinks that this development is unstoppable. Airline and airport interests will always collide. Passengers should check in quickly, should be at the gate as quickly as possible and, if possible, should quickly board the plane (Manager8). It is not in the interest of the airline for travellers to spend time and money within the airport

environment. Only one manager does not necessarily think that there is a future conflict of interests between airport and airline:

> I do not think that there is really a huge conflict between them. The airline is satisfied when the passenger is on-board on time. That is the most important point for an airline. Whether he goes shopping here or downloads a barcode in the show room and then sends it home, they couldn't care less about that. *For the airport, various business opportunities will arise in the future,* I am convinced (Manager14).

The tourist industry is growingly 'aware of the more active and adventurous older, baby boomer market. This type of tourism is poised to become a larger part of the leisure market' (Patterson and Pegg, 2009, p.268). This comment underlines Manager14's statement. Their comment, however, relates to tourism operators in general when they point out that they 'must quickly adapt their marketing strategies to this emerging market otherwise they will be left behind (Patterson and Pegg, 2009, p.269). The role of the airport is not addressed. This raises the question to what degree airports are affected in their revenue generating activities when changes in their customer base take place? Thus, it leads to the question of competition among airport.

6.3.3 Competition among Airports

Airline deregulation and privatisation created competition where there was none before (Starkie, 2002). Liberalisation led to increased airport competition and a change in their role (Barrett, 2000; Graham, 2011; Kasarda, 2008). The literature review has shown that airports need to define the value of their commercial and non-commercial service offerings to achieve competitive advantage. However, little is written in that regard about how an airport can generate competitive advantage and how it can compete with other airports. Chapter 4 offered some approaches, mostly the results of quantitative comparisons, on how Frankfurt Airport competes within its benchmark group. This section

investigates whether management thinks that a competitive advantage can be achieved through a senior-friendly orientation. In the interviews, managers were asked to comment on how they thought an airport could maintain its competitive position with older passengers.

Fynes and Lally (2008, pp.329-333) contend that the importance of the provision of service experiences is recognised by management, however, it is difficult to narrow it down and to define a specific service concept. A senior manager tries to explain FRA's service concept. He thinks that - in terms of an airport's competitiveness and the services it provides - one has to distinguish between basic and premium factors.

> [A]t most airports the basic factors are right; at a few they are not. Then there are the so-called *premium factors;* I think that is important even for a traveller. I am very sceptical that then these factors cause a passenger to book a certain flight through a specific airport rather than another […]. You have to find out about the things that are necessary for the various target groups at the airport and to identify those that are important. This is a fine art. I think in that respect the airports are at the very beginning […] to come up with sound market segmentation and to say which customer segment needs what. And what exactly is marketing bullshit, and what can be disregarded - nobody needs it and it just costs money. *Other industries are ahead there.* We are just now going through that process with all its extreme forms (Manager10).

He admits that the airport operator has just begun to differentiate its basic and premium services and to target them to distinctive groups. This shows that little knowledge exits on how airports can compete for the older travellers. 'Other industries' are part of the evolution in the service-experience economy, but airports are lagging behind (see Section 2.4.2).

6.3.3.1 The Basic Factors for an Airport's Competitiveness

The findings show general agreement among the interviewees that airports compete on the basic factors that they provide within the given infrastructure. The destinations offered from there represent such a basic factor: 'the route network that is available outweighs everything else' (Manager14). A frontline employee explains that

> [i]t is very important for an airport to offer attractive destinations. Route networks. Destinations as they are called now. [Ehm] Flight times. […] I just think that *the availability of destinations is the most important point for an airport* (Frontline2).

As part of the route network, non-stop flight connections do play a role for an airport's competitiveness. Five out of the 35 older leisure travellers were willing to pay for the extra comfort that comes with a non-stop connection. For example, 'certainly I would prefer to travel non-stop, not to change airplanes. I would pay more to go non-stop', Passenger6 comments. Another basic factor is the ticket price. This is in line with research by Loo (2008) who examines the factors in airport choice. Given the group's price-consciousness, this is of little surprise. Many interviewees across all three interviewee groups identify it as an important basic factor.

> It is still all about the *flight connection time and the price*. *And if these two primary variables are the same or similar, then the ground product is an advantage,* yes [...]. Yes, that's an important competitive factor (Manager14).

These two factors (time and price) are mostly in the hands of the airlines. The airport's service offering comes only after the offered schedule and the ticket price. A frontline employee confirms that ticket price plays a central role in the decision process for or against a certain airport, as do non-stop connections.

> Surely the flights, what are my options from which airport can I fly to what destinations. The price plays a very important role: we notice more and more how the customers decide on the price. Sometimes they accept changing planes in order to save money on the ticket [...]; they are cost-sensitive, cost-conscious [...]. The older passengers […] prefer direct connections. It is true that an elderly passenger says, I'd rather pay 100 euros more and in return I do not have to change planes in Paris, London or God-knows-where (Frontline1).

This statement allows for a deeper understanding of the decision factors in the ticket purchase. First of all, the route network of an airport is important. Non-stop direct connections are often more expensive than flights with aircraft changes at other airports. While this statement addresses the price-consciousness of the group, it also shows that some older travellers might be willing to pay a higher price in return for the comfort of not having to change. A non-stop connection is of a certain value to them, the provision of the basic infrastructure is not.

While these last statements stress that competitiveness is about connectivity and ticket price, a sound infrastructure and reliable processes are identified by interview data to play a role, too. Another frontline employee explains possible reasons for a passenger choosing one airport over the other:

> When it comes to how to promote its competitiveness ... that starts with a good infrastructure, and if I can get easily and conveniently to the airport. That there are enough car parks there where I can get a parking space relatively quickly [...] if the ticket price is the same and if the effort to get to the airport is somehow equal, then I would imagine that the older people say, 'I'm flying from this airport because it makes travelling easy' I would imagine so, yes (Frontline10).

Frontline1 and Frontline4 stress that the quality of an airport becomes apparent with its transfer processes. They say that they prefer Zurich, Munich and Amsterdam to Frankfurt Airport in that regard. 'Connecting in

Amsterdam is always perceived as a rather pleasant experience' (Frontline4). Munich Airport's Terminal 2 also receives praise:

> Frankfurt is not a very popular airport on the customer service side because it is so crowded. Because of its long distances. Munich Terminal 2, you know, is beautiful. A new airport and has all the efficiency, service points that a good airport can offer nowadays. So there is a huge advantage and we do get that a lot from our customers. I prefer to fly via Munich than via Frankfurt. But I don't think it will come into effect when choosing a flight. People are price-driven; the majority of our customers are price-driven. And the connectivity is, I think, most important (Manager2).

> it's just nice when an airport has *many destinations that it serves directly, that is without having to change planes*. Especially for the elderly [...] if the passenger knows about Munich, then perhaps he would rather fly from Munich than from Frankfurt (Frontline6).

This reflects back to Table 4-4 which provides a benchmark of the performance of European airports. Munich is in Frankfurt's primary benchmark group. The two statements emphasise the significance of the hard factors of service delivery (e.g. schedule, punctuality, transfer and waiting times). This criticism of these factors needs to be taken into consideration as the competitiveness of Frankfurt Airport as a major international hub airport depends upon its transfer processes. Transfer services are a hard factor in service delivery, whereas age-friendly infrastructure and services classify as soft factors (Handelsblatt GmbH, 2011).

6.3.3.2 The Premium Factors for an Airport's Competitiveness

In the context of this work, senior-friendliness in infrastructure and services classifies as a soft or premium factor. The research set out to determine the importance, in airport competition, of an airport product

that is designed in line with older leisure traveller's needs and expectations. That this is a point worth looking at becomes apparent by the following statement. An interviewee says that Frankfurt Airport's competiveness is decreasing as older passengers decide against using it for their travels:

> It is certainly the case that many ... or shall we say, *elders avoid bigger airports.* Because of the long distances and because of poor orientation. Because of the advice that they get from the travel agents, who advise them to use smaller airports [...]. We also see a much lower than average proportion of seniors than other major airports (Manager13).

Older passengers 'avoid bigger airports' because of infrastructural constraints that impact the passengers' experience negatively. Frankfurt Airport sees a 'much lower than average proportion of seniors' than its competing airports. A manager acknowledges that older people have a problem with Frankfurt Airport due to its size:

> We try to ease the travel process for the elderly. At the airport, studies have found that an airport is actually being shunned for fear that it is too large and complex. And *if the older person is flying at all, he or she actually prefers the smaller airports* (Manager16).

It was established that older passengers generally prefer smaller over bigger airports, which confirms the statement by the CEO of Bremen Airport (Krane, 2011, p.1) cited in the literature review (Section 2.5.4). Two managers, however, contrast the advantages of smaller airports as opposed to larger ones:

> The small airport has the advantage of smaller distances, clear and easy to navigate. The larger airport has the advantage that usually the flight is cheaper there (Manager10).

> Smaller airports have the ability to focus on special-needs customers in more detail, versus a large airport that is more focused on driving the maximum of capacity through the airport (Manager1).

These statements show that older passengers feel comfortable at smaller airports that provide personal service. They do not feel like ‘a number’ there (Passenger13). This provision of senior-friendly service raises their satisfaction with the soft factors of service quality (Handelsblatt GmbH, 2011). At Frankfurt, it would enrich the experience of the older traveller. The following statement by a managing director demonstrates this.

> We all know that Frankfurt is the main transfer hub and the focus is on the transfer. So an airport could [...] provide some services. That they can sell. *It is all about how you drive* [passengers] *through,* how you connect etc. This is what makes airports, you know, attractive ... and competitive (Manager1).

While passengers need to be ‘driven through’ the airport, she proposes that there might be a business opportunity for the airport to ease the transfer for older travellers if they offer a special, dedicated service. In the interviews, it was asked whether the older travellers would decide to fly from or through a specific airport because its processes were ‘senior-passenger friendly’. Agreement among all three groups exists that nobody would travel from or through a specific airport because its processes are catering in particular to the needs and expectations of older travellers. When asked about the provision of premium factors, one interviewee presents the following summary:

> I cannot imagine that one person [uh] travels through an airport specifically, just because the service there is better, perhaps, or is designed more individually. Whereas [uh] for the older people it is certainly important to have a certain amount of personal attention. [...] But through a special airport, I do not think so (Frontline3).

Finally, a senior manager for an airline voices her doubts and points out the main drivers for an airport's level of competitiveness. It emphasises that an airport's power is limited when it wants to enhance its premium services:

> [T]he older traveller has different needs versus a younger traveller. I think it is very difficult, very difficult to say how the airport can become more successful in that. Like I said, maybe a service, the airport operator can provide? As to sell to the older passenger [...] as an assistant in the processing through the airport. So, in terms of a 'meet and greet' but not from the airline but from the airport provider itself […] to assist them through from check-in all the way to the gate. That is what they need, but apart from that I think it will be difficult to become more successful [...] this is referring to its comp ... competitive positioning, you know. One answer could be that *as an airport you could be on a receiving end and it does not matter what you do but mostly it is about what airlines [ehh] what alliances fly into that airport and you are just there to provide the infrastructure, to make the whole route development work* (Manager1).

This shows that special provisions for older people do not increase an airport's competitiveness as such. They would only classify as contributing to the soft factors of the level of service offered by the airport (see Table 4-4). Senior-friendliness is not regarded to increase an airport's value as such. A tangible premium factor such as a 'meet and greet' service, however, may raise the level of satisfaction. Manager1's statement also points out that it is mostly the airlines that drive an airport's competitiveness. The airports are at the 'receiving end' of the decision-making process as the customers' relationship is primarily with the airline (Bergadaà, 2009). However, given the pressure the airport is under from growing competition worldwide (see Section 4-2), an adequate service and infrastructure provision to older travellers can act as a differentiator, increasing its competitiveness.

Loo (2008) concludes that airport competition is all about finding a niche and not about competing with one another directly. The research findings

specify that to cater to the niche of older travellers does not necessarily represent a viable option in itself. The main drivers for competition are the basic factors like ticket price, route network, non-stop connections and reliable transfer processes. These competitive factors lie mostly with the airlines. Airports are at the receiving end (Manager1). They can only concentrate on supporting premium services, such as designing a senior-friendly infrastructure and adequate operational processes. With those measures, however, they can increase their level of competitiveness with respect to the service provision's soft factors (see Table 4-4) which is of importance after the deregulation of the industry.

According to Park (2003, p.360), the competitive advantage of an airport depends upon five factors, namely spatial, facility, demand, service and managerial elements. According to his findings, the demand factor is the most important one when defining an airport's level of competitiveness, followed by the airport service factor. This confirms that customers decide primarily in favour of an airport because of such factors as airport access, destinations offered, the airline and flight frequency (Bergadaà, 2009; Loo, 2008).

This research's findings show that while an increased airport service factor, 'senior friendliness', is regarded as a bonus, it is not a decisive factor when passengers decide in favour of or against a certain airport. The basic factors of providing an infrastructure are more important to older passengers. This confirms that not every organisation that offers a functional value needs to provide an experience (Basole and Rouse, 2008) (see Section 2.6.6). Nonetheless, the findings show that the 'service' factor (Park, 2003, p.354) impacts an airport's competitiveness to a certain degree. Older travellers judge an airport's performance by its soft service factors (Handelsblatt GmbH, 2011).

As a result, while the previous sections have elaborated upon the service factors and their role for competitiveness, the next section takes a look

at the findings that describe the airport in its original role as a basic infrastructure provider.

6.3.4 The Airport as an Infrastructure Provider

Today's airports are perceived as a means to an end, as the findings on the demand side confirmed. Its customers do not care about the service itself; rather, they value that it enables them to travel from A to B. The state of the infrastructure at Frankfurt Airport, as such a basic factor, was subject to many comments. In general, the terminal buildings are perceived as old, crowded and lacking in atmosphere due to various infrastructural constraints. Long walking distances to the gates and the need to change levels in particular pose problems. These findings support Chang and Chen's (2012, p.535) research that shows that mobility-reduced passengers complain most about the distances they have to walk and ask for sufficient infrastructure.

In this study, at Frankfurt Airport, the atmosphere is perceived as hectic and crammed. This results in a stressful airport experience. The 'sheer size' of the terminal buildings is 'a little scary' (Frontline9). Management and frontline employees, however, distinguish between the infrastructures that are provided in the different terminal buildings. The older Terminal 1 gets more critical remarks in terms of its layout and accessibility than Terminal 2.

> I think entering Frankfurt Airport can be *a daunting experience* for everybody, especially [those] going to Terminal 1, which is *a sprawling maze.* I think that lots of elderly passengers enter the airport and feel lost. Again, it is a very busy terminal, there are lots of … there are different zones; it is not clearly explained where what is. It is quite difficult to navigate (Manager9).

In Terminal 1, the possibility of expanding its facilities and making them more accessible is limited (Manager7). It is difficult to navigate through

the buildings and to change levels. There are not enough elevators and escalators to accommodate the basic needs of passengers.

> This is a characteristic of the airport. Frankfurt has many *escalators, going up and down, where people are afraid*. More elevators are needed as well […] the airport operator has not managed [uhm] to respond such that the different levels can be overcome in an adequate way, i.e. there are *not enough elevators* […] Fraport AG would have to offer far more elevators even if it is associated with high costs and statically determined problems. But in particular in Terminal 1, with its three elevators, it is a disaster (Frontline2).

Using an escalator, in particular with a baggage cart or a suitcase, does not only pose problems but even scares people. Older travellers are afraid to stumble or fall. Furthermore, long walking distances to get to the gates in Terminal 1 pose problems to older passengers (Manager10). In contrast,

> Terminal 2 is easier on the orientation since [hm] it is much tidier, it appears bigger, and you can get along better. One moves easily from point A to point B. And also this semi-decentralised security control, they are I think a little easier to handle (Manager7).

Many interviewees agree that the basic infrastructure in both terminals does not necessarily cater to the needs of older leisure travellers. It is acknowledged that changing demographics need to be taken into consideration by the airport operator. 'When we have room for *children's play areas*, then we also should have space for … kind of quiet zones for the … that are ergonomically designed for our older passengers' (Manager6).

This comment shows that some strategic management decisions are questioned. Instead of preparing the terminals for an increase in older passengers, 'children's play areas' are being set up as part of the service campaign 'Great to have you here' (Section 4.3.6.2). In the interview,

Manager6 calls for more awareness of and interest in the older passenger clientele among colleagues.

Both terminals at Frankfurt Airport get criticised for their limited capacity, 'airports have to grow' (Manager7) to accommodate demand. Appropriate infrastructure is considered to be central for airline operations and the smooth running of the processes.

> A plane that sits on the ground costs money and cannot generate any. And the longer we are on the ground because the airport's infrastructure was not designed correctly for the size of aircraft used […] that is definitely a problem then (Manager8).

This statement shows that in its primary role as an infrastructure provider essential operational services and traffic-handling services are central (Doganis, 1992, p.7). The airport operator has to ensure that they are in place and work properly. Commercial activities play a secondary role, as the primary task is to provide adequate infrastructure to airlines.

In summary, the findings in this section show that management interprets the role of Frankfurt Airport still as mostly one of an infrastructure provider. It is aware that this infrastructure has to accommodate future challenges. One manager maintains that this role 'will not change much in the foreseeable future' (Manager10). Thus, as an infrastructure provider, Frankfurt Airport would still be in the first stage (Experience 1.0) of Neuhofer and Buhalis' (2014) concept of the evolution of experiences (see Table 2.3): passenger services are delivered as a standardised product, it is a 'passive provision' and the airport is 'staging' it within its given infrastructure to fulfil primarily the operational needs of the airlines.

6.3.5 The Airport as a Service Provider

According to Graham (2011, p.5), the public service paradigm that views an airport as a public utility to satisfy the needs of airlines and passengers

has been replaced with a commercial paradigm that views an airport as a business enterprise. As an infrastructure provider, the airport's task was primarily to bring together passenger demand and airline supply (in form of the flight product). As a business enterprise, the airport is now asked to generate revenues and profits. This poses some challenges to their development into service providers. The findings that follow illustrate how this development is perceived at Frankfurt Airport from management's perspective. A senior manager with an airline voices her concerns:

> Everything is focused on the spending of the customer. And trying to get as much revenue from the airport side. Pushing the customer through [hm] all the different shopping areas to make sure that they gain more revenue (Manager1).

Manager1 acknowledges the rising significance of non-complimentary services as part of an airport's strategies. In order to enhance the travel experience, adequate services in retail gain in importance. This goes so far that the role of being a service provider is primarily associated with the provision of commercial services. Airport operators 'develop high-end shops and an overall luxury retail experience, particularly at the world's largest hubs' (Echevarne, 2008, p.190). The significance of the retail offering as part of the airport's service provision emerges as a key finding across all data. Management thinks that older leisure travellers are interested in 'experiencing these services', if they are offered in an appropriate manner. Manager1, however, voices her doubts about whether current commercial offerings address the needs and demands of older passengers at all. She thinks that the service offering within retail does not cater to the expectations of older people. They are not in particular interested in shopping at the airport. Airports concentrate on more lucrative customer groups instead.

> I think the shops are not targeted at those customers; they are targeted at a different range of customers who have certain brand choices [hm]. I think for older people that might not be the right shops (Manager1).

Shops at Frankfurt Airport are targeted towards brand-conscious customers who are interested in spontaneous purchases in the premium segment (e.g. Chinese and Russian passengers). Another manager confirms the statement by Manager1. The heterogeneity of the group of the older travellers becomes apparent again in the following statement:

> Duty-free shopping is part of the airport experience [...]. When I look around here in Frankfurt, then the offer is not necessarily designed for the older generation, although, on the other hand, what particular shops does this generation need? (Manager4).

Given the group's wished for age-neutral service provision (Kohlbacher and Hang, 2007, p.18), however, a differentiation of the airport shopping experience is not wanted. Older people prefer an inclusive approach when it comes to shopping. A few interviewees, however, voice their wish for a pharmacy in the airside area. This confirms that 'most shopping transactions are initiated with functional utility in mind' (Poulsson and Kale, 2004, p.276). Passenger35 summarises the attitude of the most interviewees in that group. They engage in window-shopping and spend money on essentials only:

> It is quite interesting when you pass through, to see the shops, but for me it is now not an option. I buy my stuff somewhere else because I have always considered them to be highly overpriced. If something is essential, and I need something, a battery, a charger... (Passenger35)

The airport shopping environment is different from that of high street shopping. Commercial offerings are not the primary reasons for passengers' presence at the airport; there are there to fly. In times of increased commercialisation (Section 2.6.3), however, management focus is upon this area and the successes are apparent. Graham (2008, p.108) acknowledges that '[a]irport retailing has become much more sophisticated in recent years and a growing number of high street managers and best practices are now being employed at airports'.

Impulsive shopping, in particular, plays a central role for airport retailers and management: ‘The power of impulse purchasing behaviour and the potential financial rewards for retailers who maximise this effect are clear’ (Crawford and Melewar, 2003, p.94). This research’s findings close a gap that Crawford and Melewar (2003) left. Their work does not segment potential airport shoppers by demographic variables. This research emphasises that older travellers’ consumption behaviour and needs vary from other groups due to their higher need for re-assurance and comfort (Observation13, 24, 32, 46 and 47). Thus, it is important for airport management to create a stress-free, pleasant shopping environment to engage older people in impulse shopping (Lin and Chen, 2013, p.431). This poses a challenge to management because older leisure travellers attach little importance to the airport’s commercial service offerings (see Section 5.2.3).

Graham (2009, p.108) contends that ‘retail is only one part of the airport business and a balance between the commercial and aeronautical aspects must be achieved’. This work examines how airport management balances this two aspects in regard to Frankfurt Airport’s role as service provider. By far the most popular complimentary service offerings identified by management are the electric shuttles and carts that run throughout the terminal. Older leisure travellers are ‘happy’ to use them ‘to cover long distances’ - ‘it is an excellent product’. These shuttles are a free service offered to all passengers (Manager14). While the use of wheelchairs is regarded as being for physically impaired passengers only, interviewees classify the carts as a true, yet free, service offering by the airport.

One key idea that emerges from the findings to individualise a non-commercial service offering is that of an ‘airport assistant’ who helps the older travellers through all the processes. This (human) assistant provides them with the much-wanted personal attention and guides them in an individualised, less stressful way onto the flight. Two interviewees

explain that older passengers have voiced their wish for such an assistant. ‘They would be happiest really if they had an escort service from check-in to the gate and then they would feel safe and cared for [...]. Personal contact is desired’ (Manager10).

> Well, I think for an older passenger [uh] it would be a simplification, if he had an assistant. Not only for him, but that they might be in the group and they are all accompanied through the whole airport from check-in to the plane. That there is someone there who takes care specifically of the needs of the elderly passengers (Frontline10).

This wish for a personal assistant stresses how important the personal service element is if the airport is to develop into a service provider or even a service experience provider. This is in accordance with findings reported by John et al. (2009, pp.560-570). They conclude that physical service is less important than aspects of emotional service provision and value co-creation. Their findings describe how the provision of personal services contribute highly to the passengers feeling valued, while customer participation (i.e. the interaction with a human being) enhances their comfort level. They feel less stressed. As personal service shows an essential effect on overall experience value, an assistant would contribute to such an enhanced experience at the airport (Prebensen et al., 2013).

This section has shown that, from management’s perspective, the airport’s service provision is closely connected with the provision of commercial services. Retail, restaurants and other facilities impact the airport experience. The statements in the management group indicate that they are aware that older leisure travellers are not that interested in the retail services of the airport. Furthermore, the findings reveal that non-commercial services like shuttles are commonly associated with the airport’s service provision. One service offering they show willingness to pay for is an ‘airport assistant’ who provides help with the operational processes and helps them on their journey through the airport.

6.3.6 The Airport and Tourism Travel

The findings in the previous sections stress that the airport focuses on operational processes; only a few commercial offerings might be developed for the creation of a memorable event as part of the overall holiday in the future (e.g. an 'airport assistant'). Frankfurt Airport is turning into a service provider but not a service experience provider. This stresses that the role of an airport as part of the overall tourism experience is limited. There are no indications that it is part of future strategy to improve the airport experience of older leisure passengers. This finding can be evaluated against the statement from Poulsson and Kale (2004, pp.275-276) that not every organisation that provides a solid functional value needs be an experience provider. Frankfurt Airport provides a functional value for its older clientele but not a memorable experience; nor is it expected by its older clientele to do so. It will be interesting to see how this role of an airport, in an increasingly competitive environment, develops in the future.

Patterson and Pegg (2009, p.254) claim that older travellers are 'a prime example of a niche market firmly embracing the notion that the next wave of successful tourism businesses will be those geared towards the experience economy'. This comment, so far, relates to tourism agencies only and not to airports. It stresses that the airport's role in the travel value chain has to be examined separately and requires further investigation. It contradicts Brilha's (2008) comment that airports have found their role in the tourism value chain.

While '[t]he customer experience is the only sustainable competitive advantage that the airline can have' (Manager9), opinions on what kind of an airport experience needs to be provided do vary. Manager6, for example, draws a critical picture of what role the shopping experience as part of tourism travel plays:

> ‘Shopping and excitement? I don’t know many people for whom this is an essential part of the trip […]. Going on their holidays, *the actual holiday experience is what actually counts.* The flying and the going through the airport are just part of the necessary evil if you like to get from A to B. And that’s how a lot of people view their journey. So I think *we are overestimating the part that the airport plays in the entire experience.* What people care about is their hotel. We find out very often that this is where they spend their money. That’s where they have to spend to upgrade their rooms or their hotel experiences. As the travel part itself, *it is just A to B and then it’s over. It is certainly more pleasant to go to a nice airport but I don’t think it will make a break on his journey’* (Manager6).

This contradicts the idea that the airport is an exciting destination in itself (Feldman, 2009). It also adds another dimension to the ideas of an ‘aerotropolis’ (Kasarda, 2008) or a ‘distinct social space’ (Hannam et al., 2014, p.173). Manager6’s view shows that there are doubts about the significance of the role of the airport for the overall holiday experience. It plays a minor role and provides only the infrastructure for the flying from A to B. For that the passenger is ‘processed’ (Manager5) through the process unless he or she wants to shop. In that case, the passenger is of interest to the airport operator as revenue is generated. The journey through the airport is a ‘necessary evil’ (Manager6, Manager9, Observation25). Leisure travellers prefer to spend money in the destination, for example, at the hotel (Manager6).

In contrast, Forsyth et al. (2008, p.338) contend that airports evolve from public utilities and that airports take on a much more proactive role. Only one evidence, however, is given that management starts to interpret the services that it provides at the airport as part of the overall holiday experience in a more proactive way.

> I mean, yes, you have to think about this whole travel experience [...] it is not only the airport, not only the airline. Yes, it starts at the moment in which the traveller says, I go to a travel agency and inform me. And

> get some advice and pick up a catalogue, it is already there [...] it starts in the moment it is in the mind of the traveller, the idea and we engage in this process chain (Manager6).

This statement stresses that airports' engagement in the process chain will gain in significance in the future. 'The continuous enhancement and creation of innovative, compelling and valuable experiences is critical for business operating in the dynamic tourism industry' (Neuhofer et al., 2013, p.547).

Increasingly, tourism research (e.g. Stickdorn, 2014, p.331) suggest to look at the whole journey, the holiday experience in a holistic manner. The airport is one of the organisations in this process chain that need to explore opportunities to create enhanced tourism experiences (Patterson and Pegg, 2009, pp.268-269). Thus, airports should be part of the overall holiday experience. However, this work has shown that they are not for older leisure travellers. The airport experience does not affect the overall tourism experience as it would be expected. It does not affect it in a positive manner. Older people continue to see the airport as an infrastructure, it is a necessary evil (Observation25), a means to an end (Passenger16). The holiday starts in the destination as interviews and observations confirm. Contrary to Brilha's (2008, p.173) comment, Frankfurt Airport has not found its role in the tourism value chain. It does not enhance the older leisure travellers' overall holiday experience.

6.4 Conclusion

First of all, the findings show that management is aware of population ageing. They perceive it as a slow development, not a trend that requires immediate strategic attention. This interpretation, however, contrasts the findings in Table 4-5 and Section 4.2 which point out that immediate management attention is warranted. In absolute terms, the number of older passengers passing through FRA is on the rise. At the same time, management is in the early stages of learning about the older leisure

traveller and catering to their needs. Population ageing's effect on the airport's customer base is only speculated upon. This confirms Thompson and Thompson's (2009) observation that few organisations manage to adapt their service offering to older customers. Management shows little interest in developing strategies that cater to the expectations of older people, as long as they are still mobile, do not rely upon special assistance and do not impact the general passenger flow through the terminals in a negative manner. If passengers are in need of assistance, services provided for passengers with reduced mobility are offered (Section 5.3.4). This is despite passengers traveling with reduced mobility have a different experience (Kirk, 2013, p.172) than older travellers who are still mobile. A proactive move towards the development of appropriate, senior-friendly infrastructure and services at Frankfurt Airport was not noted. Because the overall passenger process works, there seems to be no need for service innovation. The findings also show that the airport mostly follows the airlines' strategies in terms of service provision, it is 'at the 'receiving end' (Manager1). The airlines' strategies are more service-oriented in that respect; they differentiate passengers by marketing criteria that allow for individualisation of their offerings (Manager9). Thus, they evolve within the service economy.

The findings show that management is of the opinion that standard passenger services and terminal infrastructure suffice. No differentiation of the airport product according to passenger age takes place; infrastructure and processes are designed in an age-neutral fashion, with a focus upon operational elements. As a result, the airport fails in being 'socially sensitive and responsive' (Poria et al., 2010, p.224). Due to the group's heterogeneity, management faces difficulties when it comes to segmenting them (e.g. Manager6, Manager10, Manager14 and Manager16). Potential new business opportunities to create enhanced tourism experiences within the airport environment remain unexplored. This is despite out of the sixteen managers interviewed seven think that it might be a business opportunity to cater to their specific needs and demands. Possible premium services for older passengers are part of the

standard service provision. For example, no dedicated airport assistant (Passenger1, Frontline10 and Manager10) is available for older people on a complimentary basis. This service is offered (non-complimentary) by the airport operator and incorporated age-neutral into the regular passenger process.

Second, the findings on the supply side show that the airport environment has become increasingly automated and commercialised. The days are gone when airports only supplied a public transport infrastructure. Airports worldwide are under pressure to become modern-day service providers (Kasarda and Lindsay, 2011). The personal service element, that is central for older travellers, is on the decline in this process. Instead of catering to changing needs in their customer base, the findings reveal that strategies are driven by cost reduction and process optimisation. The airport product is increasingly dominated by a move towards technology-based self-service encounters. The focus is upon the process activities (Kirk, 2013, pp.163-164), which are part of the industry's overall process optimisation efforts.

Third, the findings indicate that Frankfurt Airport is an infrastructure and service provider but not a service experience provider. If the airport had found its role in the tourism value chain as Brilha (2008, p.173) claims and its objective were that of a service experience provider, the task would go beyond the standard provision of an automated and commercialised environment. In the interviews, Frankfurt Airport's role is associated with the provision of non-commercial services (in its role as an infrastructure provider) and commercial services (in its role as a service provider). Indications within the collected data that the role of an airport is that of a service experience provider are not given. As a service experience provider, an airport would 'intentionally [use] services as the stage, and goods as props, to engage individual customers in a way that creates a memorable event' (Pine and Gilmore, 1998, p.98). The airport experience of the older leisure traveller is not such a memorable event although they wish for a 'happening event' (Manager2).

As a fourth major point, the discussion of the findings on the supply side reveal that Frankfurt Airport's competitiveness is not about the soft factors of service provision or about senior-friendliness. The literature review has indicated that the competitive advantage of an airport depends upon five factors, namely spatial, facility, demand, service and managerial elements (Park, 2003, p.360). This research shows that competition among airports is primarily about flights offered (demand), ticket price (demand), a sound infrastructure (facility) and reliable processes (managerial element). Frankfurt Airport does not compete upon the soft components of the service element such as atmosphere, distances/signage or friendliness of staff (see Table 4-4) for older people. Increased competitiveness through the provision of age-adequate services and infrastructure is not of importance to management. Frankfurt Airport still primarily manages 'logistical flows of airlines and passengers' (Frank, 2011, p.31). Thus, it competes upon the operational measures of an infrastructure provider and not upon augmented service nor service experience elements.

7. CONCLUSIONS AND IMPLICATIONS

The final chapter first provides the thesis summary. In Section 7.2, the work's main findings are highlighted. Section 7.3 outlines the contributions of relevance to the literature, to older travellers and to airport management. Limitations of the findings are summarised before suggestions for future research are made.

7.1 Thesis Summary

The first chapter introduced the reader to the topic. The literature review in Chapter 2 started with a summary of population ageing in Western societies. Literature was discussed that portrayed the older traveller who passes through an airport. Then, the relationship between air transport and tourism travel was investigated. The service experience (Pine and Gilmore, 1998) and the evolution of the service economy (Neuhofer and Buhalis, 2014) were introduced as conceptual frameworks for the present investigation. A model by Lally and Fynes (2006) offered the possibility of examining the service experience and its components in greater detail. This was followed by the discussion of Sykes and Desai's model (2009) on the airport passenger experience, with its commercial and non-commercial service offerings.

The second part of the literature review continued with an examination of the actual service experience at international airports. The themes that help to explain this service encounter, i.e. mobility-reduced travel, service quality, personal service and increased self-service technologies were elaborated upon. The discussion then turned to the changing roles of airports. Deregulation, privatisation and commercialisation were identified as the main drivers that impact the development of their roles. All these different streams in the literature led to the identification of the gaps in the literature that this work addresses. Chapter 2 concluded with

the formulation of the three research questions to explore the airport experience of the older leisure traveller.

Chapter 3 described the work's methodological framework and the design of the research. Due to the research's multidisciplinary nature, an approach was needed that allowed for an in-depth investigation from different perspectives. A qualitative, single case study - inductive in nature - evolved as the most suitable method to gain insight into the three areas of the investigation. For data collection, face-to-face interviews and non-participatory observations were used. A total of 66 interviews (including 4 pilot interviews) were conducted. Fifty non-participatory observations took place to complement the interview data. This proved to be a robust combination of techniques that allowed for a comprehensive description of the older leisure traveller's experience at Frankfurt Airport.

At this stage of the research process, it became apparent that further background information was necessary. Thus, Chapter 4 explored the case setting. It served as an introduction to selected issues that a major international airport and its passengers are being confronted with. Furthermore, it elaborated upon themes within the service encounter that were discussed within the literature review. It described the increase in air travel and its close relationship with leisure travel. Information on the case's specific setting at Frankfurt Airport was offered. The airport's traffic and passenger structures were examined briefly. This was followed by an overview of the airport's passenger process and its service offerings as they impact the overall holiday experience.

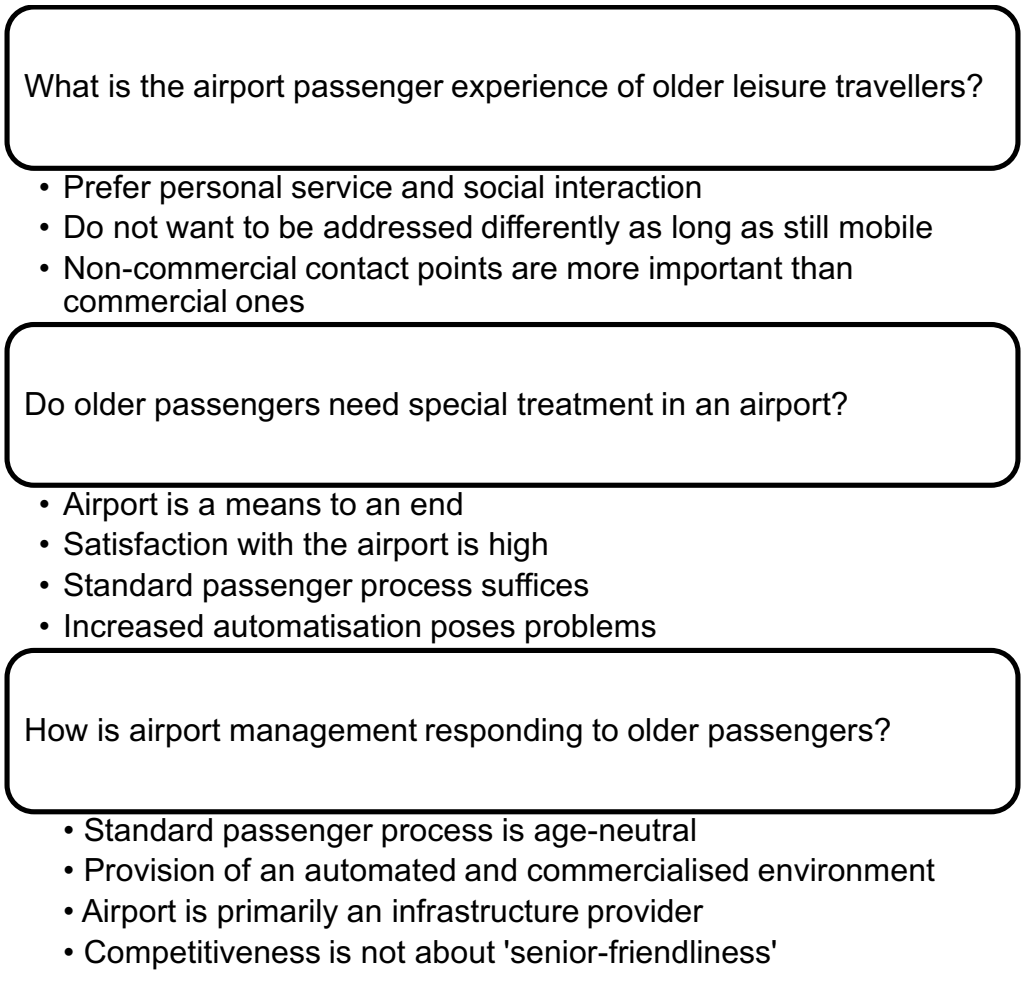
Chapters 5 and 6 presented and discussed the findings of the work in light of the three research questions, first from the demand and then from the supply side. This discussion reflected back to the review of the literature and to the context chapter. First, the airport passenger experience was described. Second, the question was examined of whether older leisure travellers are in need of special treatment when

they pass through an airport. Third, a look was taken on how airport management responds to population ageing.

7.2 Main Findings

This work addresses different gaps in knowledge on older people at an airport. By investigating the three research questions, a comprehensive understanding of the airport experience of the older leisure traveller emerged. Figure 7.1 summarises the main research findings.

Figure 7-1 Main Research Findings



7.2.1 The Airport Passenger Experience

On the demand side, in response to the first research question, the findings show that older leisure travellers prefer personal service. To make their journey through the airport more pleasant, reassurance and personal attention from airport staff are appreciated. Social interactions with fellow travellers and frontline personnel are important for them at the various contact points throughout the terminals. They prefer an inclusive approach within the standard passenger process and do not want to be addressed differently or singled out. A clear differentiation between people who are mobile and those who are reduced in their mobility is made. Direct assistance is required only when they start losing their mobility. The findings point out that an awareness exists that personal service within the airport environment is on the decline; this is a development that is met with regret. The freedom to travel is a measure of older people's quality of life. They are willing to spend money on quality and comfort but this is mostly associated with the flight or with the holiday destination, and not with the airport.

Older leisure travellers attach importance to the non-commercial points that account for their overall airport experience (i.e. check-in, customs clearance and security screening, luggage retrieval and boarding). These basic operational, process activities are central for their overall experience. They expect them to see fulfilled without flaws. The layout of the terminal buildings, long walking distances and signage pose problems for older passengers. Most perceive the environment as stressful. Commercial offerings at Frankfurt Airport (availability of shops, duty-free goods and associated services) are less important to them. The findings reveal further that older leisure travellers are price-conscious. They are of the opinion that commercial offers at the airport are too expensive.

7.2.2 The Need for Special Treatment

The second research question explored whether older leisure travellers are in need of special treatment when they journey through the airport. The findings show that the standard airport product (with its special service provision for passengers travelling with reduced mobility) fulfils existing needs and caters sufficiently to their expectations. They do not need nor ask for special treatment. The service encounter at the airport is not perceived as a central part of the overall holiday experience. In general, expectations of this part of the holiday are low. Furthermore, they expect the airline, not the airport operator, to cater to their needs. The airport is regarded as a public infrastructure or a means to an end to start a holiday. At the same time, satisfaction with FRA is high among older travellers.

The air transport industry's drive towards automatisation came up as a central point of concern in the interviews and observations. The findings highlight that the airport environment is increasingly dominated by a move towards technology-based self-service encounters. This development poses problems to older travellers. It affects their airport experience and with that their holidaymaking behaviour. Their attitude towards self-service technologies, however, varies. Some perceive automatisation as unstoppable, some are capable to adapt to the automated processes, others rely upon help.

7.2.3 Airport Management's Response

The third research question looked at the airport experience from the supply side. The findings reveal how management perceives and deals with older people within the airport environment. Frankfurt Airport is among the top three airports in Europe in terms of passenger volume. The forecasted ageing of German society and the rising demand for air transport leads to an increase in the absolute number of older passengers (Section 4.2). However, management perceives population

ageing as a slow development, not a trend that requires immediate strategic attention. Managers are only slowly taking population ageing into strategic consideration (Section 4.3.6.3). The effect on the airport's customer base is only speculated upon. Due to the group's heterogeneity, management faces difficulties segmenting them according to marketing criteria.

Management shows little interest in developing strategies that cater specifically to the expectations of older people, as long as they are still mobile, do not rely upon special assistance and do not impact the general passenger flow through the terminals in a negative manner. This view neglects potential threats to operational processes that are caused by the group (e.g. flight delays due to large numbers of wheelchairs). A proactive move towards the development of appropriate, senior-friendly infrastructure and services at Frankfurt Airport was not noted. This lack of strategic interest in the group is of surprise, as the development of an airport's role suggests that the days are gone when they only supplied public transport infrastructure. With the need to generate revenues, airports worldwide are under pressure to turn into service or even service experience providers to attract future traffic.

The findings show that management is of the opinion that the standard passenger services and terminal infrastructure that are in place suffice. No differentiation of the airport product according to passenger age takes place; infrastructure and processes are designed in an age-neutral fashion, with a focus upon operational elements. Services for older passengers are part of the standard service provision. Although the airport operator's strategy puts an emphasis on value creation, strong performance and sustainability, the support of mobility in old age is not an issue for the airport operator. Instead the airport product is increasingly dominated by a move towards technology-based self-service encounters. The focus is upon the process activities, which are part of the industry's overall process optimisation efforts to reduce costs.

As a result, Frankfurt Airport is an infrastructure and increasingly service provider but not a service experience provider. Frankfurt Airport's role is associated with the provision of non-commercial services (in its role as an infrastructure provider) and commercial services (in its role as a service provider). Frankfurt Airport does not compete upon the soft components of service provision such as atmosphere, walking distances, signage or friendliness of staff. Increased competitiveness through the provision of age-adequate services and infrastructure is not considered as a strategic option. This is despite, FRA introduced a service innovation campaign (see Section 4.3.6.2) with the aim of increasing passenger satisfaction. The findings stress that Frankfurt Airport primarily still competes upon the operational measures of an infrastructure provider.

7.3 Contributions of this Research

The research encourages an exchange of ideas between tourism, airport management and population ageing. This integrated knowledge is important for understanding the passenger experience of an older leisure traveller at a major international airport. The findings answer the research questions raised at the beginning of this work. Section 7.3.1 discusses the research's conceptual contributions. In Section 7.3.2, findings that are of relevance to the older leisure traveller are highlighted; followed by those that are of interest to management.

7.3.1 Conceptual Contributions

There are two main conceptual contributions of this study to theory development. Firstly, the findings contribute to an enhanced understanding of the concept of the service experience within tourism and air transport. While the 'experience economy concept has been introduced to the tourism literature only at an introductory conceptual level' (Oh et al., 2007, p.129), it has not been introduced to the airport environment at all. Investigation of the holiday experience generally takes

place on site, i.e. in the destination (Morgan, Elbe and de Esteban Curiel, 2009, p.205). The start and the end of the journey are rarely investigated.

Given that the literature at the interface not only of tourism and airport management but also at the interface of those two with population ageing is scarce, this work contributes to the literature by opening up a possible exchange of ideas between these fields. This comprehensive understanding of the older leisure traveller's experience at the airport from different perspectives represents a new approach. It explains the role of the airport as part of the older leisure travellers' tourism experience. The findings serve as a starting point for a debate about how airports deal with societal change.

The experience concept by Pine and Gilmore (1998) was used as a conceptual framework for examining the airport experience of the older leisure traveller. Pine and Gilmore suggest that organisations should provide consumers with experiences. Transferred to this study's context this means that airports are asked to provide experiences to older leisure travellers. Work by Lally and Fynes (2006) and Sykes and Desai (2009) then allowed further examination of the service experience and its components within the airport environment. On the demand side, the findings show that Frankfurt Airport is not part of the experience concepts' evolution from the experience economy to co-created experiences, towards technology-enhanced experiences (Neuhofer and Buhalis, 2014, p.124). As an infrastructure provider, Frankfurt Airport is still in the first stage (Experience 1.0) of Neuhofer and Buhalis' (2014) concept of the evolution of experiences (see Table 2.3).

With its commercial and non-commercial offerings, Frankfurt Airport provides services but no service experiences to older leisure travellers. While a service experience would provide the travellers with both 'functional and emotional values' (Sandström, 2008, p.118), the findings show that an airport is mostly expected to provide functional value. It is a means to an end in the tourism value chain and plays a minor role for the

overall holiday experience. The findings stress that the airport focuses on operational processes; only a few commercial offerings might be developed for the creation of a memorable event as part of the overall holiday in the future (e.g. an 'airport assistant'). Thus, Frankfurt Airport is evolving into a service provider but not a service experience provider. The findings stress that the role of an airport as part of the overall tourism experience, however, is limited. There are no indications that it is part of strategy to improve the airport experience of older leisure passengers. This finding questions Brilha's (2008, p.173) remark that airports have found their role in the tourism value chain. Their contribution to the holiday experience of older leisure passengers is limited.

Secondly, the research enhances the understanding of the role of an airport in today's society. The findings support Frank's (2011, p.31) view that the 'primary function of an airport is still to manage logistical flows of airlines and passengers'. To attract this traffic flows in the first place, it needs to enhance its competiveness. This competitiveness can be increased in the eyes of the older leisure travellers by improving its performance in its service elements. This work shows that soft factors contribute to these service elements. Thus, the design of age-friendly infrastructure and adequate operational processes enhances an airport's level of service in the eyes of the older leisure travellers. This improvement in the service element is not primarily about future airport choice. It is about the older travellers' decision to stop flying altogether and decide in favour of other modes of transport (see Table 4-8).

For older travellers, the airport is primarily an enabler of mobility; it is an infrastructure provider for transportation. This contradicts the idea that the airport is developing into an appealing destination in itself and adds another dimension to the concepts of an 'aerotropolis' (Kasarda, 2008) or of a 'distinct social space' (Hannam et al., 2014, p.173). Unlike cities worldwide, airports do not aim for the creation of 'age-friendly environments' (World Health Organization, 2015, p.5). They do not explicitly support ageing population's wish for increased mobility.

The ‘commercial paradigm’ (Graham, 2011, p.5) dictates the airport’s strategies and the social obligation to cater to needs of its customers is neglected (Poria et al., 2010, p.224). Deregulation of the industry and privatisations of airports led to challenges in meeting societal expectations of an airport’s role. The changing role of airports ‘has moved from the construct of the citizen as benefiting from airports as an essential element […] to becoming a customer of a privatized commercial service’ (Baker and Freestone, 2008). Fraport Airport faces the dilemma of having to provide a public infrastructure when catering to the needs of older people without a ‘public service agenda’ (Baker and Freestone, 2008). One manager maintains that this role ‘will not change much in the foreseeable future’ (Manager10).

7.3.2 Findings of Relevance to the Older Leisure Traveller

It was one objective of this work to produce something of relevance to those being studied, i.e. the older travellers. The findings of this work can improve their situation within the airport environment. This is in answer to Morgan, Pritchard and Sedgley’s (2015, p.15) call to tourism scholars to ‘more fully address global agendas on ageing well, social inclusion and subjective wellbeing’. The research engaged older people in the research process to learn about their situation at first hand and to gain insight into their ‘personalized accounts of tourism experiences in later life’ (Sedgley et al., 2011, p.423). It investigated whether current commercial and non-commercial offerings fulfil older passengers’ expectations and whether their needs and demands are met.

Kirk (2013, p.163) comments that ‘a gap in the understanding of the problems passengers face comes from the absence of a focus on the passenger’. This research offers insight into one passenger group’s specific expectations, needs and demands. It raised the question whether a deregulated, privatised airport system, driven by commercial pressure, faces difficulties meeting its social obligations such as taking care of the needs of an ageing population by providing age-adequate

infrastructure and services. This investigation took place against Zhang and Czerny's (2012, p.30) statement that 'there may be a discrepancy between the welfare-optimal and private airport behaviors'. This research shows that the airport operator does not fail in meeting the basic needs and expectations of older travellers. At the same time, the findings stress that older passengers expect little of the experience that is provided to them by the airport operator. Their level of satisfaction is high. They ask for a transport infrastructure that allows them to fly and this is provided to them. However, their airport experience can be enhanced as part of their overall holiday. They voice their wish for age-neutral passenger processes and infrastructure that avoid discrimination. They do not want to be singled out but rather participate in all commercial and non-commercial offerings. Thus, future airport design should aim for a discreet approach to their needs. An inclusive, discrete, yet senior-friendly, passenger service can make their travel through the airport easier. For example, a complementary, personal service can be offered that supports people with limited mobility in a non-discriminatory manner.

The price-consciousness of older travellers indicates that they are not interested in material things (i.e. commercial offerings). They are more interested in personal encounters, the acquisition of experiences, when they journey through the airport. That means that the service provision has to go beyond the operational aspects of getting people on to an aircraft. This finding elaborates upon Popovic et al.'s (2010, pp.9-10) work that investigates the airport passenger experience in terms of activities and interactions. They claim that the way that the passenger experience is managed leads to their satisfaction or dissatisfaction. This then influences their emotional responses. An adequate passenger experience that meets the described expectations can create such positive emotional responses.

The airport experience can be divided into the 'provided experience' and the 'self-made experience' (Major and McLeay, 2013, p.14). While the provision of the 'provided experience' is mostly in the hands of the airport

operator, passengers expect primarily the airlines to look after their needs. The findings emphasise, however, that older travellers are more interested in the 'self-made experience'. They want to create their own experiences when they travel. This becomes apparent by the high importance they attach to socialising with fellow travellers and frontline staff as well as group travel. They want to enjoy, to have fun and to travel in comfort. In other words, they want to engage in value co-creation by engaging in the service process (Grönroos and Voima, 2013, p.144). Personal service plays a central role in that regard. In particular, increased automatisation poses problems to them. Most older people were not passing through the airport with ease. Instead of enriching their holiday experience, self-service technologies created additional stress in an already tense environment. Thus, future service provision has to incorporate personal control and human interaction to appeal to them and to avoid them stop flying.

7.3.3 Findings of Interest to Management

There are various managerial implications of this work. First of all, the findings emphasise that a closer examination of the group is warranted. Due to the rising passenger numbers (Table 4-5) and the overall positive development in air travel (Section 4.2), Frankfurt Airport sees an increase in absolute numbers of older people.

Previous research in airport management has focussed on understanding the passenger experience from an operational perspective. The focus was upon process activities (Kirk, 2013, pp.163-164). This research minimises the knowledge gap on how an airport 'can go about improving specifically [its] customer experiences' (Johnston and Kong, 2011, p.6) by adapting a more comprehensive perspective. The identification of the exact nature of the airport experience is important to define an airport's strategies to increase competitiveness. With more demanding people travelling, management is asked to 'establish continuity of accessibility throughout the travel chain' (World Health

Organization, 2011, p.195). This is necessary to ensure that people keep on flying when they get older and do not decide in favour of other modes of transport.

The changing interpretation of the role of airports in society constitutes a change in the management of a (former) public utility. If the situation at the airport is to be improved in this process, a focus on customer, staff and cost efficiency is necessary. The challenge is to translate the older passengers' experience 'into service encounter, service delivery and service environment specifics' (Otto and Ritchie, 1996, p.73). This work highlights some business opportunities and challenges. It provides management with ideas on how an airport can improve perceived value in the eyes of travellers (Halpern and Graham, 2013, p.142) and design its service offering to position itself in a growingly competitive environment.

Airports have to adapt their strategies in order to cater to the needs of their primary customers, the airlines. An airline can offer an adequate service on the ground only when the airport has adequate infrastructure and operational processes in place. It is already a challenge to accommodate the increase in the numbers of people who ask for wheelchairs and pressure on operational processes will increase in the future. The popularity of assistance provided by FraCareServices is not only proof, however, of future challenges to operational processes but also a sign that costs in that field are due to increase. The absolute numbers of PRM passengers travelling through Frankfurt Airport are on the rise. The 'abuse rate' of PRM services (i.e. passengers who ask for assistance but are not really reduced in their mobility) is estimated to be at ten per cent (Manager11). With changing demographics, this abuse rate is likely to increase in the future. This means that for airlines, the costs associated with the provision of services for passengers with reduced mobility are on the rise. This increase in the number of passengers who are classified as PRMs takes place not only due to population ageing but also because of growing obesity and medical

needs worldwide. Ancell and Graham (2016) are the first to suggest a framework for airlines to audit and benchmark their PRM costs. This shows that the rise in PRM numbers is of concern to airline management and, as a result thereof, that it is an issue that needs to be addressed by airport management.

Social factors that relate 'to population and demography (such as age, household, education, occupation) and cultural factors (such as attitudes, preferences, values, beliefs, relation and lifestyle' impact on trends in air travel (Halpern and Graham, 2013, p.36). While these factors affect the demand side, the findings of this work show that they also pose various challenges to the supply side. However, potential business opportunities can arise. If airlines wish to offer a 'memorable event' (Pine and Gilmore, 1998) within the airport environment, then airports are challenged to make adjustments to the role they fulfil. The provision of undifferentiated infrastructure and impersonal services is not enough in the future. Airports will be asked to provide satisfying individualised service experiences to a highly heterogeneous customer group. Managers have to recognise their 'diverse lifestyle patterns and consumption habits […] where the "one size fits all" mindset just does not cut it' (Patterson and Pegg, 2009, p.269).

Graham (2014, pp.173-187) suggests prioritisation of the measures that can be taken to increase service quality, raise the satisfaction level and contribute to an overall positive airport passenger experience. Her approach underlines the importance of linking service quality with overall experience. Emphasis should be placed upon those areas which customers rate as less than satisfactory, but are at the same time of high importance. The findings of this research show that older people attach most importance to reliable service provision at the non-commercial customer points (check-in, customs clearance and security screening, luggage retrieval, boarding). They ask for a flawless performance in basic service elements. Personal assistance in form of knowledgeable and easily available service personnel is of utmost significance to them. An

adequate supply of infrastructural elements such as water fountains and clean bathrooms is taken for granted. Free shuttles for ad-hoc assistance to cover the long distances throughout the terminals are being asked for as are free baggage carts. To request official assistance through FraCareServices is avoided because older people do not want to be singled out in the regular passenger process. They desire to participate in and to co-create their own holiday journey. Thus, the objective should be to design an airport experience that achieves a non-discriminatory, age-neutral approach to meet older people's needs and expectations.

In contrast, the commercial offerings (availability of shops, duty-free goods and associated services) were of little significance to older travellers (see Section 5.2.3). Older passengers attach little importance to retail and commercial offerings in the terminals. This is despite leisure (low-cost) travellers are in general willing shoppers at airports (Forsyth et al., 2008, p.338). To encourage older people to shop at Frankfurt Airport, a retail environment has to be provided that caters to their needs and reduces their level of stress. Management needs not only to address the points of contact in the terminal building but to take a holistic view of the whole end-to-end journey. Attention has to be paid to the fact that service elements, terminal design, passenger processes and operations are expected to be delivered seamlessly. They all contribute to the creation of the overall airport experience. When this experience has to be customised and individualised, management has to proactively approach future service development.

The findings stress that older people are satisfied. They are loyal to Frankfurt Airport as long as they still can fly. To ensure that they do not switch to alternative modes of transport when they get older, management has to ensure that they not only 'receive highly interactive, customized and efficient service' but that the 'quality of their service experience and the physical service environment is of the highest standard' (Ganesan-Lim et al., 2008, p.558). To this end, it will not be enough to rely solely on process optimisation through automatisation to

create future value propositions. The introduction of self-service technologies needs to be monitored to create an appealing experience for older people. Technology is only accepted when it meets older travellers' motivations and desires. Acceptance of self-service technologies 'is broader than simply that of usability, efficiency and speed' (Alcock and Millard, 2006, p.74). Thus, the industry's move towards greater automatisation, due to process optimisations, needs to keep older people's needs in mind.

In conclusion, Major and McLeay (2013, p.10) in their investigation of the experience of older consumers with package holidays, note that if 'their holiday experience is managed effectively, there is the opportunity for organisations to develop relationships with very loyal customers'. Management is asked to develop these loyal relationships with older people already for the airport part of their overall holiday journey. It needs to explore opportunities to create enhanced tourism experiences. The challenge is to translate the findings on what constitutes a senior-friendly airport into strategy and operations to maximise this possible unique positioning among airports worldwide.

7.4 Limitations

Although a comprehensive picture emerged over the course of the research process in answer to the key research questions, there are limitations to the chosen methodological approach. The first limitation of the work is a result of its research design. With the decision to use a single case study, the question arises of whether the findings from the one specific case can be generalised to other cases (Flick, 2007, p.118). Do the results of the thematic analysis show validity beyond the situation of older people at Frankfurt Airport?

It has to be acknowledged that the inductive approach did not result in in generalisations. While this approach allowed for detailed, in-depth data

collection, it led to contextual findings. Older leisure travellers represent an example of a broader class of a social phenomenon; their changing needs and demands were described within one specific environment. The same holds true for management's responses to the studied phenomenon. Data was collected from people who fly. The design of the research did not allow for interviewing people who have stopped flying altogether. To obtain more reliable data, it would have been useful to explore the effect of the airport experience on this decision further.

Older passengers decide in favour of the aircraft as their preferred mode of transport for a variety of reasons. This research has concentrated on air travellers who go on holidays. While the purpose of travel was established throughout the interviews, this was not possible in the observations. In some instances, there were clues (e.g. in the overheard conversations) that confirmed that the passengers were travelling on holidays. In other observations, it could not be ruled out that people's reasons for flying were different (e.g. visiting friends and families, medical tourism or business). Furthermore, in the observations age was only estimated. This estimate of people's age was based upon the researcher's interpretation of physical characteristics. Both factors led to limitations in the dataset but were unavoidable due to the nature of non-participant observations.

The relative small sample size in qualitative research did not allow for further exploration of underlying heterogeneity within the group of older people. This is a limitation in this work's findings because socio-demographic backgrounds affect travel behaviour. They impact the perception and the expectations of the experience at the airport. Larger samples from quantitative research would be beneficial in further explorations of demographics as Section 7.5 shows. Other than age, no other demographic variables were accounted for. In the interviewees, no questions were asked about people's income, education, location, culture or family status.

The researcher tried to seek diversity when asking older people for their willingness to be interviewed. The same effort was made in the observations. However, data collected dealt mostly with the experience of German-speaking leisure travellers. A more diversified sample might have led to possible variations among different nationalities or cultures because of variations in their holiday behaviour.

Despite these limitations, the work's findings can be used as a reference for how older passengers are treated and how they perceive their experience at other airports worldwide. This is supported by the fact that airports' service provisions are complex but comparable due to the high level of standardisation within the global air transport industry. Passenger processes are highly standardised around the world. Thus, international airports of a comparable scale with analogous customer bases offer many similarities when it comes to dealing with passengers. Due to the international nature of air travel, the passenger experience at one airport can be transferred to other similar airports.

7.5 Suggestions for Future Research

This thesis has shown the complex relationship that exists between leisure travel and air transport, in particular when another variable (i.e. an ageing customer base) is introduced. Little research exists that explores the interconnectivity between such different variables from a marketing management perspective. While the issues that can be investigated are manifold, three main suggestions for future research emerged. They could distinguish between the experiences of the travellers themselves ('self-made experience') and the experience provided to them (Major and McLeay, 2013, p.14).

The first suggestion for research is to investigate further the impact of increased automatisation on the service experience of older passengers at the airport. Given the older leisure travellers' preference for personal

service and social interaction, one interesting path for future research would be to investigate how older people accept self-service technology and react to the many technological advances within the airport environment. A better understanding of older leisure travellers' expectations in that regard should help airport management to design passenger services in line with older people's needs and demands. It would also be interesting to explore whether automatisation is a problem just for older travellers or for other passenger groups as well? For example, the increasing number of requests for wheelchairs as transfer services between North America and India (Frontline1, Manager1 and Observation4) suggests that cultural factors also may play a role in this regard. In some cultures, complimentary and personal assistance for travellers is important. Future research can investigate what groups in society (to be identified by socio-demographic characteristics) are more inclined to adapt to self-service technologies than others.

The second suggestion is to enhance the findings of this work by conducting a wider study of older air travellers and those who have stopped flying. Qualitative and quantitative information are important for a holistic understanding of the scope of the problem identified by this research. In order to get more in-depth socio-demographic characteristics of the population, a quantitative research method can serve to enhance this work's qualitative findings. Future research could investigate how socio-demographic backgrounds and characteristics such as household income, disabilities, education, marital status or location affect older people's travel behaviour. Furthermore, future research could explore whether the reason for travel impacts the expected and perceived experience at the airport? Do passengers who go on holidays have different expectations and perceptions than those who travel to visit friends and families or fly to their holiday home? A combination of qualitative and quantitative data would then improve validity. Addressing some of the limitations of this work, this combination can produce more valid evidence and generalizable results about the scope of the problem. For example, a quantitative telephone survey could

provide insight into detailed demographic data and its effects on holidaymaking behaviour. Data in this study was collected from people who decided in favour of an aircraft as mode of transport. A telephone survey would reach people who might have stopped flying for a holiday altogether. Thus, this mix of quantitative and qualitative data could deepen understanding of the reasons why people stop flying at a certain age and the airport's role in this decision process.

The third suggestion is to explore the development of the role of the airport within the service experience economy from a strategic point of view. No critical academic discussion of demographic development and its effect on airport business models was found which indicates that - for reasons that need to be explored - this issue is of little concern to management. Adequate strategic approaches are missing, creating the need for research that combines management practice with contemporary theories about how to address the societal need for increased mobility into old age. Work on customer engagement and value co-creation in an increasingly automated environment could serve as a basis to design the passenger process and the associated infrastructure. Management research could explore the significance of the airport experience for future competitiveness. Can an airport increase its competitiveness by positioning itself as senior-friendly?

7.6 Concluding Remark

This work helps to answer Forsyth et al.'s (2008, p.343) call to enhance the understanding of the fascinating and 'structurally intertwined relationship' between air transport and tourism. It has advanced the understanding in this research area. With the focus on the airport environment, it introduced population ageing into this already complex relationship. The work provides a starting point for future research on older people within the airport environment. There are many different perspectives one can take and they all warrant further exploration.

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APPENDIX 1 Conversational Guides

Conversational Guide: Manager

1. Could I just ask you to introduce yourself briefly and say something about your role in [company xyz]?

2. Populations in Western societies are ageing. More and older people are travelling. Does this have an effect on your business?

3. What is your vision of future airport development? Do today's airports continue to develop more and more into shopping malls? Or is there actually less time available - with all the advances in technology - to spend money in retail shopping at the airport?

4. Do you think that the larger and more cost-effective the airport, the less customer-friendly it has to be? According to Jürgen Bula (the CEO of Bremen Airport) older passengers show appreciation when smaller airports' processes are simple, straightforward and stress-free. He claims that today's major airport cities are not designed with the needs of older customers in mind but solely in line with economic and logistical demands. In your experience, is this true?

5. To what extent are the needs and demands of older passengers being built into today's airport cities? Do smaller airports do a better job with older passengers because there is more room for personal service instead of self-service technology? Can you put 'smallness into largeness', i.e. a personal touch, into today's airport cities? If yes, what are the key issues to achieve this?

6. When an older passenger goes through the terminal, he or she has to deal with many customer service points before finally boarding the aircraft. From your point of view, do these following points enrich or detract his or her experience at an airport?

a) Speed of check-in? Please explain.
b) Efficiency of passport control? Please explain.
c) Customs clearance and security screening? Please explain.
d) Luggage retrieval? Please explain.
e) Availability of shops? Please explain.
f) Duty-free goods and associated services? Please explain.
g) A spacious and relaxed environment in which to wait prior to boarding the aircraft? Please explain.
h) Self-service technology? Please explain.

7. How does your company develop its strategy? Could you tell me something about your role in the strategy process?

8. Today's older passengers are fitter and richer. What is your company doing to explore the market potential of this passenger group? Are you developing any specific services or products for older passengers? How can the strategy process of your company be changed to accommodate the wishes and demands of older passengers?

9. How do you think an airport can maintain its competitive position? What new products or services would enhance the passenger experience in the eyes of the older traveller? With increasing passenger expectations, can service become the most important differentiating factor instead of price? What value proposition does your company concentrate on?

10. Hypothetically speaking, do you think that a specific value proposition can be created for the older passengers? What exactly would it look like and how would your company go about delivering it? Can this value proposition result in a competitive advantage for your company?

11. Evidence suggests that older people do not want to be singled out and do not want to be treated differently. Is it part of your company's strategy to work on passenger products and services that are specifically developed for older passengers, that are customised for older passengers, or that are age-neutral?

12. Interestingly, Singapore Airlines has just removed its self-service check-in kiosks from Changi Airport due to low levels of usage. Do you think that this is the right strategic move? Do you see a return of the old-fashioned personal service provision, with fewer automated do-it-yourself processes? How do you feel about the role of these new technologies? Do they add value as expected to your passenger processes?

13. In your experience to what extent does the current design of passenger processes at Frankfurt Airport not take the needs of older passengers into consideration? Can you describe an example when you thought that a passenger at Frankfurt Airport needed to be addressed differently because of his or her age?

14. Have you heard about Frankfurt Airport's service (innovation) campaign 'Great to have you here'? It consists of four key themes:

'Friendly and Attentive':
How do you think Frankfurt Airport is performing in this field currently?

'Fast and Comfortable Travelling':
How do you think Frankfurt Airport is performing in this field currently?

'Pleasant Ambience':
How do you think Frankfurt Airport is performing in this field currently?

'Shopping and Excitement':

How do you think Frankfurt Airport is performing in this field currently?

Can you describe any improvements to the older passenger's experience that you have witnessed as a result of this campaign? Which theme is the most relevant to the older passenger? Is there a key theme that is missing, in your point of view?

15. Are you familiar with the initiative of the federal government of Germany to improve mobility in older age? It focuses on the design of intermodal interfaces within complex infrastructures such as airports and train stations. Part of this initiative is the so-called PASS project at Frankfurt Airport. PASS stands for 'Personalised assistance system and services for mobility in old age' and it makes - via an easy-to-use mobile device - various types of auxiliary information available to elderly passengers to ease their journey. What is your judgement of such a service offering? Is it making a difference to the older passenger's experience?

16. How do you work together with other service providers or authorities in order to optimise processes for older passengers? Can you please give some examples of good teamwork between the different service providers at Frankfurt Airport? What are the challenges of providing seamless service and what can be improved?

17. Would you like to add anything?

Conversational Guide: Frontline

1. Could I just ask you to introduce yourself briefly? What company do you work for? What is your function?

2. The population of Western societies is ageing. More and more older people are travelling. What are the implications for your role? What does this mean for your daily routine at work?

3. According to the CEO of (the relatively small) Bremen Airport, older passengers show appreciation when smaller airports' processes are manageable and straightforward. He claims that today's major international airports are not designed with the needs of older customers in mind but solely in line with economic and logistical demands. How do you feel about this statement?

4. When passing through an airport, a passenger has to deal with many customer service points. How would you rank the importance of the following points in relation to older passengers? (1, very important; 2, important; 3, neither important nor unimportant; 4, of little importance; 5, unimportant)

a) Speed of check-in
b) Efficiency of passport control
c) Customs clearance and security screening
d) Luggage retrieval
e) Availability of shops
f) Duty-free goods and associated services
g) A spacious and relaxed environment in which to wait prior to boarding the aircraft

5. How do you think an airport can stay ahead of the competition? What are the most important factors?

6. People warn against stereotyping and claim that older people do not want to be singled out. What approach does your company apply? Do you have products and services in place that are specifically developed for older passengers, that are customised for older passengers, or that are age-neutral? Can you please provide some examples?

7. What makes it easier for an older passenger to pass through the airport? What services or products would enhance the experience? Can you please provide examples? In your experience, can you charge extra for such a product or service?

8. Would older passengers decide on a specific airport because its processes are 'senior passenger friendly'? In your opinion, what adds value to their passenger experience? Do you think that certain

improvements could cause older passengers to decide to fly from or through a specific airport?

9. At airports worldwide there is a shift towards less personal services and more automated do-it-yourself processes. How do you feel about the role of these new technologies? Do they have an impact on your job?

10. In your experience, to what extent does the current design of passenger processes at Frankfurt Airport not take the needs of older passengers into consideration? Can you describe an example when you thought that a passenger at Frankfurt Airport needed to be addressed differently because of his or her age?

11. Have you heard about Frankfurt Airport's service (innovation) campaign 'Great to have you here'? It consists of four key themes ('Friendly and Attentive', 'Fast and Comfortable Travelling', 'Pleasant Ambience' and 'Shopping and Excitement'). How do you think Frankfurt Airport is performing in those four areas currently? Can you describe any improvements that you have witnessed?

12. Frankfurt Airport is taking part in a programme of the federal government of Germany which is working to improve mobility in older age. It focuses on the design of intermodal interfaces within complex infrastructures such as airports and train stations. Part of this initiative is the so-called PASS project. PASS stands for 'Personalised assistance system and services for mobility in old age' and it makes - via an easy-to-use mobile device - various types of auxiliary information available to elderly passengers to ease their journey. How do you feel about such a service offering?

13. Do you work hand in hand with other service providers, institutions or authorities in order to optimise passenger processes? Can you please tell some examples of good teamwork at the airport? What are the difficulties in providing seamless service? What can be improved?

14. Would you like to add anything?

Conversational Guide: Passenger (First Round)

1. Could I just ask you to introduce yourself briefly? Which age bracket are you in (60-65, 65-70, 70-75, 75-80, over 80)? Are you still working or are you fully retired?

2. You are an older passenger. More and more older people are travelling. Does this hold true for you? How has your attitude towards travelling changed over the last 10 years?

3. According to the CEO of (the relatively small) Bremen Airport, older passengers show appreciation when smaller airports' processes are manageable and straightforward. He claims that today's major airport cities are not designed with the needs of older customers in mind but solely in line with economic and logistical demands. How do you feel about this statement?

4. As a person of a mature age, what are the most important factors for you when you decide to fly from or through a specific airport? Have these factors changed over the last 10 years?

5. Do you think that the bigger and more cost-effective the airport, the less customer-friendly it has to be? Do you wish for a more personal touch? From your perspective, what would it take to put a personal touch into today's big airports?

6. Do you think that the specific needs of older passengers are being addressed by today's big airports? Can you please provide examples?

7. When passing through the airport you have to deal with many different service contact points. How would you rank the importance of the following points for yourself? (1, very important; 2, important; 3, neither important nor unimportant; 4, of little importance; 5, unimportant)

a) Speed of check-in
b) Efficiency of passport control
c) Customs clearance and security screening
d) Luggage retrieval
e) Availability of shops
f) Duty-free goods and associated services
g) A spacious and relaxed environment in which to wait

8. People warn against stereotyping and claim that older people do not want to be singled out. Given the choice, would you prefer products and services that are specifically developed for older passengers, that are customised for older passengers, or that are age-neutral?

9. What makes it easier for you to pass through the airport? What services or products would enhance your experience? Can you please

provide some examples? Would you be willing to pay extra for such a service offering?

10. What does the term ‘senior passenger friendly’ mean to you? Would you decide to fly from or through a specific airport because its processes are ‘senior passenger friendly’?

11. Worldwide there is a shift towards less personal services and more automated do-it-yourself processes at most airports. How do you feel about this change? Are you using the new technologies at airports when you travel or do you prefer personal contact with service staff?

12. How often have you travelled through or from Frankfurt Airport in the last 12 months? Can you tell some stories from your last trips through the airport? How do you feel when you travel through Frankfurt Airport?

13. Can you describe an example of when you were travelling through Frankfurt Airport and you thought that you needed to be addressed differently because of your age?

14. Have you heard about Frankfurt Airport’s service (innovation) campaign ‘Great to have you here’? It consists of four key themes (‘Friendly and Attentive’, ‘Fast and Comfortable Travelling’, ‘Pleasant Ambience’ and ‘Shopping and Excitement’). How do you think Frankfurt Airport is performing in those four areas currently? Can you describe any improvements that you have witnessed?

15. Frankfurt Airport is taking part in a programme of the federal government of Germany which is working to improve mobility in older age. It focuses on the design of intermodal interfaces within complex infrastructures such as airports and train stations. Part of this initiative is the so-called PASS project. PASS stands for ‘Personalised assistance system and services for mobility in old age’ and it makes - via an easy-to-use mobile device - various types of auxiliary information available to elderly passengers to ease their journey. Have you heard about it? Do you like the idea of getting information in such a way or would you prefer personal contact?

16. When you travel, are you conscious that, at the airport, you have all different kinds of service providers (e.g. airport operator, airline employee, handling services provider, border control, customs officer) working together? When you travel are you aware of these different players and how they work together? Who is the most important contact for you (e.g. check-in, security control, boarding gate or baggage claim)? What can be improved?

17. Would you like to add anything?

Conversational Guide: Passenger (Second and Third Rounds)

1. Would you mind me asking you some questions? Are you going on a holiday? Where are you flying to and for how long?

2. Which age bracket are you in (60-65, 65-70, 70-75, 75-80, over 80)? Are you still working or are you fully retired?

3. How has your attitude towards holidaymaking changed over the last 10 years? Do you take more or fewer trips abroad by air than before?

4. What are the most important factors for you when you decide to fly from or through a specific airport? What does the term 'senior passenger friendly' mean to you? Would you decide to fly from or through a specific airport because its processes are 'senior passenger friendly'?

5. How often have you travelled through or from Frankfurt Airport in the last 12 months? Can you tell some stories from your last trips through the airport?

6. What is your experience when travelling through an airport these days? What role does your experience at the airport play in your overall holiday experience?

7. Can you describe a situation when you were travelling through this airport and you thought that you needed to be treated differently because of your age?

8. Which offerings at Frankfurt Airport are the most valuable for you? How are your expectations being fulfilled?

9. Do you think that this airport is addressing the needs of older holidaymakers? What services or products (commercial and non-commercial ones) would enhance your experience?

10. When passing through airports you have to deal with many different service contact points. How would you rank the importance of the following points for yourself? (1, very important; 2, important; 3, neither important nor unimportant; 4, of little importance; 5, unimportant)

a) Speed of check-in
b) Efficiency of passport control
c) Customs clearance and security screening
d) Luggage retrieval
e) Availability of shops
f) Duty-free goods and associated services
g) A spacious and relaxed environment in which to wait prior to boarding the aircraft

11. In recent years, we have seen increased automatisation taking place at the airport. How do you feel about this change from face-to-face human interaction towards self-service technology? Do you wish for a more personal approach with service staff?

12. Are you using new technologies such as check-in kiosks or self-boarding gates when you go on holiday? What is your experience with these new technologies?

13. Would you like to add anything?

APPENDIX 2 Consent Form

Interviewee: Informed Consent Form

Please read the following document which explains this research study. When you sign this form, you acknowledge that you have been informed about the research and that you are willing to participate.

Title of Study: (First Round of Interviews) Combining design thinking and service innovation in strategy to create value: The case of Frankfurt Airport and the older passenger.

(Second and Third Round of Interviews) The experience of the older leisure traveller at an airport: A case of Frankfurt Airport

Student: Natalie Wolf

Supervisors: Dr Sue Tempest
Dr Peter Lyth
University of Nottingham, Business School
Nottingham, England

Project Description:

This research study is about the ageing of society and its impact on an airport's strategy. The planned research seeks to find out whether a competitive advantage can be gained by developing strategies that address the needs of older passengers at a particular airport. Stressing the importance of service innovation, design thinking and value creation, the claim is that a new strategic orientation by airports, airlines and other service provider is needed in order to optimise the business opportunity that the older passenger represents. The research's objective is to make a small contribution to improving practice, while enhancing scholarly knowledge in the field of strategic management.

You are being asked to participate in this study because of your knowledge and experience in the researched field. The work is partially funded by the Erich-Becker-Stiftung. Fraport's data protection officers have given their permission for the researcher to contact potential interviewees for the study.

Description of Procedure:

You will be asked to answer several questions in the following interview. The interview will take a maximum of 60 minutes of your time. Please be frank and open when answering the questions. In total, about 40 interviews will be conducted to collect data from three different groups, namely 'management', 'frontline personnel' and 'older passengers'.

To the first group belong managers from Fraport AG, station/operations management as well as sales and marketing managers from airlines and managing directors from (third-party) service providers at the airport. 'Frontline personnel' are mostly flight attendants and station personnel, whereas the older passenger group consists of international travellers who are older than 65 years and who have passed through Frankfurt Airport recently.

What are the Risks and Benefits?

There are no foreseeable risks associated with participation in this study.

This research might provide a better understanding of the needs and demands of older passengers. Its findings could help with the formulation of strategies on how to deal with demographic change and how to improve an older passenger's journey through an airport. If you agree to participate, you will receive a summary of the study's findings upon completion of the work. There is no financial compensation for taking part in this study.

Statement of Confidentiality:

Your participation in this study is confidential. Collected data from this interview will be transferred directly from the recording device to a computer. The file on the digital voice recorder will then be erased. The recording of the interview will be saved on a private computer which is password-protected. All data is to be stored upon completion of the thesis for seven years and then destroyed. It is exclusively being used for this project only and not for other purposes. If this research leads to a publication or presentation, no personally identifiable information will be shared. Your anonymity will be ensured by the coding of your name (i.e. Manager1, Frontline1 and Passenger1) throughout all stages of the research process.

Voluntary Participation/ Withdrawal:

Your participation in this study is entirely voluntary. You can ask to pause the recording, correct your answers or stop completely at any time. You do not have to answer any questions you do not want to answer.

Thank you.

At this point, please ask any questions or voice any concerns you may have.

If you agree to take part in this research study, please sign below as an indication of your willingness to participate. Upon request, you may receive a copy of this document.

_____

(Participant Signature/ Name Printed) Date

Contact details (if interested in receiving a summary of the findings only)

Email: _____

Street: _____

City: _____

Country: _____

_____

(Person Obtaining Consent/ Name Printed) Date

APPENDIX 3 Sample of Interview Data

[Rustling]

INTERVIEWEE: Nothing to drink?

INTERVIEWER: No, thank you.

INTERVIEWER: Could I just ask you to introduce yourself briefly and say something about your role in Fraport AG?

INTERVIEWEE: Yes, my name is [...] and I am in charge of corporate development.

INTERVIEWER: Populations in Western societies are ageing. More and more old people are travelling. Does this have an effect on your business?

INTERVIEWEE: [hmm]

INTERVIEWER: Frankfurt Airport business now?

INTERVIEWEE: Yes, I hesitate a bit because it is difficult to judge, of course, absolutely. That is not a development that is realised in jumps; it is more of a gradual change, where there are always several counter-trends and movements. In general, it is widely acknowledged that people are getting older in Western countries.

INTERVIEWER: Yes.

INTERVIEWEE: At the same time the environment is changing, we see attitudes change towards life ... let's say, the environment in which these people find themselves in. Yes. Ten or 15 years ago it would have been impossible or nearly impossible, for people who are over 65 to get on the plane. Today it is normal. As a result, I think we must not make the mistake, to project the past ... into the future in this subject. It is too simple to say, I look at how it was in 1980 and simply project that into 2040. The way we are going to travel is going to change very much. How we use airports and the issue of demographic development is a factor that is very difficult to isolate. We cannot generalise and say yes or no. It is a societal trend that will have an influence. What kind of influence, perhaps because we are going to talk about that later?

INTERVIEWER: Yes.

INTERVIEWEE: Is still not sure from my perspective.

INTERVIEWER: But the issue is finally on your agenda?

INTERVIEWEE: The issue is on the agenda, we are working on it and try to project how we are going to deal with this new group of people, and indeed a very large group of older people [ehm] it will be. What services they need, what they demand, but the first results in the context of our project PASS, the ones we dedicate ourselves to the moment, show that it is not so easy to give examples. [Ehm] We cannot address elderly people with products for the old.

INTERVIEWER: Yes. This is a question later on ... [laughs].

INTERVIEWEE: Oh, sorry.

INTERVIEWER: No, no it already is. The differentiation is very large?

INTERVIEWEE: Yes.

INTERVIEWER: The range what constitutes old today is very large.

INTERVIEWEE: Exactly.

INTERVIEWER: And not the biological age.

INTERVIEWEE: Yes, yes.

INTERVIEWER: But other sub-groups that occur there.

INTERVIEWEE: Now again back to the question so that you can use the answer at the end of the day ...

INTERVIEWER: Oh, I'm sure I can use everything.

INTERVIEWEE: [laughs]

INTERVIEWER: Any wise word that is being said.

INTERVIEWEE: [laughs] The first question is, does the frequency of travel change? Yes. And what we realise is, of course, when people retire from their professional life, they overall travel less.

INTERVIEWER: [hmm]

INTERVIEWEE: And that's for sure, if you are travelling on business, they usually travel more. If they are no longer part of the work life, they travel less. [Ehm] That is more of a negative trend. A positive trend is that we see in previous years, that the frequency of travel increases in older people very much and ... that they are willing to use the aircraft as mode of travel then. [Ehm] Yes. And that's a positive trend. Whether it is positive or negative in the bottom line remains to be seen.

INTERVIEWER: What is your vision of future airport development? Do

today’s airports continue to develop more and more into shopping malls? Or is there actually less time available - with all the advances in technology - to spend money in retail shopping at the airport? Background of the question is, I have spoken with some airlines and their ideal version or how they work ... is that the passenger has already done everything at home.

INTERVIEWEE: Yes, yes.

INTERVIEWER: And the first customer contact, ideally, is taking place on board the plane. Whether it's now Airline3 or an American carrier.

INTERVIEWEE: [hmm]

INTERVIEWER: Do you see it that way?

INTERVIEWEE: Yeah, that's the trend from the perspective of an airline. They do it to save costs, because they have no desire to give each passenger individually a boarding pass in the hand. To print the boarding pass, take the suitcase that all does cost time and money. So they work on passing as much as possible on to the customer. What does this mean for us as airports? I think that the role of airports in the foreseeable future will not change much [Ehm].

INTERVIEWER: The role of being an infrastructure provider?

INTERVIEWEE: Yes, infrastructure provider ... infrastructure operator but let’s say also

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INTERVIEWEE: to create, to develop, to develop a site where the journey begins. Yes. And what is the beginning of travel? I go there and there begins my journey. The journey begins at the airport; that is why travel and the actual experience is one aspect of it. But also getting prepared for the trip. Everything that goes with it. That will not change greatly in the future.

INTERVIEWER: Do you think that the larger and more cost-effective the airport, the less customer-friendly it has to be? According to Jürgen Bula the CEO of Bremen Airport older passengers show appreciation when smaller airports’ processes are simple, straightforward and stress-free. He claims that today’s major airport cities are not designed with the needs of older customers in mind but solely in line with economic and logistical demands. In your experience is this true?

INTERVIEWEE: [laughs] What kind of a statement is that? There is no correlation that the larger and economically well run an airport is, the less customer-friendly it is. I think that's nonsense. The larger the airport, the greater are the challenges. Yes. But the size of an airport is not always

negative. It may be evaluated like that but there are also many positive effects. Many compounds, if I miss a flight, I can take the next, and, and, and ... [hmm] what is right and this is a point that we have analysed in great detail, and in that regard old passengers are not different from the rest of the passengers; [hmmm] that is why passengers actually select a specific flight. Why do they choose a particular flight over another? Two major criteria came out very strongly and those are time and ticket fare.

INTERVIEWER: [hmm]

INTERVIEWEE: The fare in the first place. That means I choose my flight dependent upon which one is the cheapest and the second criterion is how fast I get there, where I want to go.

INTERVIEWER: That means, if you turn that around, that nobody would fly to Frankfurt just because the processes there are senior-friendly?

INTERVIEWEE: I do not know. That can also mean that when I am an elderly person and am very insecure, and say, well, I am afraid of changing within an hour in Frankfurt, then I choose to fly into Paris, where it is much less efficient and I have three hours of in transit. If this is the case, then we are faced with different challenges. I think that older people are much more sensitive when it comes to selecting an airport and a flight. And choose precisely from where and how they fly.

INTERVIEWER: [hmm]

INTERVIEWEE: Yes. And the factor price will play the most important role for older people in the foreseeable future. But the factor time most people approach that with a holistic view, I think. They look at just how much time do I need for the entire trip. And therefore, again coming back to the question, the larger the airport, the larger are the challenges to turn it into a customer-friendly airport. [Ehm] However, I still think that you can meet these challenges and as an automatism, I do not honestly, I do not see that airport cities do not satisfy the needs of older customers. I do not see that. No one comes to the airport because he wants to have the most stress-free experience, come to the airport because they want to travel.

INTERVIEWER: [hmm]

INTERVIEWEE: It has to work well and that's the challenge. And no one flies from Bremen if he lives in Frankfurt because this airport has such short distances. They will use this airport here then. Yes.

INTERVIEWER: Just with having the airport at the front door here in Frankfurt.

INTERVIEWEE: Yes.

INTERVIEWER: But the question is, if I have the choice between

Stuttgart and Frankfurt, and I live right in the middle. Where is the pain threshold then? At what point am I willing to accept a higher ticket price.

INTERVIEWEE: Yes.

INTERVIEWER: For some degree of greater comfort.

INTERVIEWEE: Yes. Well there are of course pros and cons for both airports. The small airport has the advantage of smaller distances, clear and easy to navigate. The larger airport has the advantage that usually the flight is cheaper there.

INTERVIEWER: [hmm]

INTERVIEWEE: The processes there are more efficient. It usually has more offers, which is very important. Keyword, I've missed a flight. Do I have to wait a week until I can fly again? Or just two hours [Ehm]? To achieve that the distances are as short as in Stuttgart; we will never be able to offer that. That's why we have to live with the drawbacks. And try a little to mitigate them, through various measures. Maybe we will talk about that later. The question is, what we can do there?

INTERVIEWER: [hmm]

INTERVIEWEE: But our advantages

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INTERVIEWEE: I do not want to forget about them.

INTERVIEWER: [hmmm] That addresses the next question a bit. At its core is the personal touch. It is ultimately the assumption that for older passengers, personal service is still important.

INTERVIEWEE: Yes.

INTERVIEWER: The question is whether personal service still can be described in the airport cities? [Ehm] Whether it is through the red jackets, who are in the terminal and address the customers en route or how you can still somehow counteract the fact that the terminal buildings are only truly full of technology?

INTERVIEWEE: Yes. [Ehm] Yes, it is a difficult point, I'm not so sure that personal touch or service is really the future, what the elderly wish for. What have we learned so far from the PASS project? We see that people who are now 60 and 65 all have a mobile phone or a smartphone, yes. They have grown up with it and know how it works. Most of them also know how flying works.

INTERVIEWER: [hmm]

INTERVIEWEE: The typical 70-year-old from a decade ago, the one who does not find his way around the airport - that one no longer exists [Ehm]. When people grow up with technology, it is also normal for them to use them as they age. This will be the big trend. Then of course there are a smaller number of people and they will always have physical disabilities, limitations; they think that they cannot handle it anymore. [Ehm] And of course you must cater to their needs. You have to put together packages for them. I also believe that this is possible at larger airports; we're working on that. We go to them individually and ask, what is your problem, how can we help? However, I do not think that this will be the majority of older people. I think that in 20 years from now, we will see many older people who have the technical ability to innovate. Because they're simply getting used to that. And that's why I see such an anachronism, as it is described here, not really. Does that now break your hypotheses?

INTERVIEWER: No, no, not at all. No, no.

INTERVIEWEE: On the other point.

INTERVIEWER: [laughs] The theories are quite different. You will not notice them; they are so well hidden [laughs].

INTERVIEWEE: I see. [Laughs] Sure.

INTERVIEWER: When an older passenger goes through the terminal, he or she has to deal with many customer service points before finally boarding the aircraft. From your point of view, do these following points enrich or detract his or her experience at an airport? The first point is the speed of check-in process?

INTERVIEWEE: Yes, terrible, terrible. Annoys everyone. That’s why we support the efforts of the airlines, too, to make the passengers check-in at home. Self ... Self-service check-in.

INTERVIEWER: Airline3 is now at the point where they do not allow the passenger to come forward without at boarding pass at the baggage check. Is this ultimately a re-education process?

INTERVIEWEE: A re-education process and this is also the future. [Ehm] Ten years from now, this will be the standard and the old people will be used to it. That is the default then. This then gives us another chance to position new services.

INTERVIEWER: [hmm]

INTERVIEWEE: Because then we will see a group of elderly people who have a lot of money.

INTERVIEWER: Yes.

INTERVIEWEE: And they will be prepared to pay for it if they are well looked after. Yes. Although I must specify that a bit; I do not want to narrow down this clientele to older people. There is a group of people who say pfff, I can do everything myself but I am willing to pay *x* euros if someone does that for me. Yes. And to get the airports to initiate new services, to generate them, that is I think the great opportunity for airports.

INTERVIEWER: The efficiency of passport control?

INTERVIEWEE: Yes, well for everyone. Just as customs clearance and security check. I hope that there will be new technologies that all you have to do is just passing through. That's all.

INTERVIEWER: Baggage claim. Concretely ... that is... what I said initially about holistic design thinking ... we are known in Frankfurt for having a conveyor system that is not really very friendly for the elderly passenger, (a) because the bags fall over each other and (b) because it is hard to lift the bags off it. I have now just heard that at A Plus the same system is being built?

INTERVIEWEE: Okay.

INTERVIEWER: Is that a sign, yes that these demographic shifts

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INTERVIEWER: are not being incorporated into such projects as A Plus, that they are not included. If so, at what point are they incorporated into the planning process?

INTERVIEWEE: Yes, well we are really not there yet. This is not only the case with all the demographic issues, but with many topics. Fraport is a big tanker.

INTERVIEWER: [hmm]

INTERVIEWEE: Certain issues, like we approach construction projects, we have been handling in the same way for years. That's a good thing. If we think about it every time we have to realise something, then we are getting nowhere. [Ehm] It will prevail at some point in time. You somehow have to incorporate help. I do not know what options there are. One must look at how things are then easier for older people.

INTERVIEWER: This subject I have picked now consciously chosen with regard to your future job [laughs].

INTERVIEWEE: Ah. Nice.

INTERVIEWER: I am interested in the planning process for terminal. I do sometimes think whether …

INTERVIEWEE: Yes, of course.

INTERVIEWER: Are those factors taken into consideration at all?

INTERVIEWEE: Nope.

INTERVIEWER: Into the planning or not at all?

INTERVIEWEE: Not at all. Frankly, we don't know yet how we are supposed to look at that from the perspective of older people. Some inspections now take place with that age group. We are now doing interviews with elderly passengers to ask, what are their problems? What bothers you most? I can say at every corner of the terminal what bothers me as an older man, but the question is what points are significant. One cannot re-design the whole terminal.

INTERVIEWER: [hmm]

INTERVIEWEE: We have to focus on those that are really important. Perhaps it is this baggage issue but it might be also other topics.

INTERVIEWER: Yes, I would assume so. There are things like the PA announcements in the crowded gate area in B, the noise level there. There is the subject of relaxed and spacious waiting areas, which are of a certain importance. But also things like font size on this whole thing, airport signage in the terminals.

INTERVIEWEE: Yes.

INTERVIEWER: So, probably the classical subjects ageing brings along?

INTERVIEWEE: The biggest issue here and which is not mentioned so far are the long distances. That's what scares people the most. Orientation and long distances that clearly came out in our passenger surveys. When transiting ... what bothers them the most, why do they possibly avoid Frankfurt? Orientation and long distances.

INTERVIEWER: [hmm]

INTERVIEWEE: Because we need to come up with something. I think it is also clear that if an elderly person has to walk two kilometres with a suitcase in his hand ... that is hard.

INTERVIEWER: Yes, yes.

INTERVIEWEE: Well, shops?

INTERVIEWER: Shops. Availability of shops. Differentiated between landside and airside.

INTERVIEWEE: Yes.

INTERVIEWER: Then also duty-free shops and other services. Since the classic health food store is actually missing?

INTERVIEWEE: Yes, well that's obviously what our airport relies upon. Apart from the fact that we earn money, it is obviously an attraction at the airport. There's time, older people still have more time [ehm] and to them it is interesting as for everyone else.

INTERVIEWER: [hmm]

INTERVIEWEE: Maybe at some point there will also be brands for older people ... I do not know.

INTERVIEWER: Yes, precisely because there is no pharmacy in transit ... I will also try to have a conversation with retail, to see whether changes in passenger structures are taken into consideration. Because yes, as I said, the traditional health food store really is missing.

INTERVIEWEE: Yes, but I actually think that it is true that my colleagues are acting reactively in that regard. You do not see shops for seniors in the pedestrian zone. [Ehm] Maybe at some point there will be a fashion label for men over 60 or so ... I have no idea. If so, then of course there should also be one at the airport.

INTERVIEWER: [hmm]

INTERVIEWEE: Now we must be careful that we do not discriminate against them. I think it is not at all good. Every marketing expert with whom I've spoken so far confirms that, yes, this is an important target group, but they do not address them directly.

INTERVIEWER: [ehm]

INTERVIEWEE: Otherwise, they are in fact all gone.

INTERVIEWER: Self-service technologies. Enrichment or impairment of the airport experience?

INTERVIEWEE: [ehm] I find that enriching. [ehm]. Because I think that the generation of today, who are 40 to 50 years are, they have become accustomed to it. They will take it with them when they grow old. And if you have something nice, any apps or some great technologies, I can imagine that they consider that to be an asset. Because we need to get rid of this idea that the old person will use an old-fashioned phone with a dial

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INTERVIEWEE: to call someone in the future, this we will not see.

INTERVIEWER: You won't get that in the future. But right now I see more and more elderly passengers in front of these self-service kiosks without a single contact person there to help them out. Who knows what will happen next.

INTERVIEWEE: That is correct. But then we have to talk about again, what periods we are looking at. If you look at the demographic development in Germany, then it's a slow process. Then one day in 2015 or 2030 it will gain in importance.

INTERVIEWER: [hmm]

INTERVIEWEE: Very much so then because all the baby boomers will retire. And by then it is indeed a development that is not vastly different from what we see today. It is more insidious. Then comes a very sharp increase and ...

INTERVIEWER: then it flattens again, yes.

INTERVIEWEE: It flattens again. And until then, yes, the big question is, and that is the big strategic question of how companies can make the most of this huge mountain of baby boomers that will then stand in front of the door.

INTERVIEWER: [hmm] Yes. Both on the customer side and on the employee side.

INTERVIEWEE: Yes, yes. From the perspective of the workforce we have now investigated exactly what requirements we have in 2020. And there the requirements are actually manageable. The operational or corporate challenge that we have to meet is little about the age demographics; the average age at Fraport is something like 42 or 44.

INTERVIEWER: Well, thank you. That was the first set of questions. The second one now deals a bit now with strategy.

INTERVIEWEE: Okay.

INTERVIEWER: The first question, how to develop your company's strategy? Can you tell me something about your role in the strategy process? You probably can tell me about that now for two hours now [laughs].

INTERVIEWEE: Do you know our strategy and planning guide?

INTERVIEWER: [laughs] The manual I do not know. I only know what is

on the intranet, about the planning process.

INTERVIEWEE: Yes, yes.

INTERVIEWER: [ehm]

INTERVIEWEE: That's where the phases are described.

INTERVIEWER: Yes, yes,

INTERVIEWEE: So

INTERVIEWER: Yes, because I will also quote from it accordingly. For me, it is more important, how such an issue, as now, for example, changes in passenger structures, such as ... how you get your data straight from market research.

INTERVIEWEE: Yes.

INTERVIEWER: How all this is channelled back to the individual business units.

INTERVIEWEE: Yes, well. So we have an annual strategy and planning process that we go through every year, very strict. With a very clearly defined sequence of steps. And that starts with a strategy meeting where we in business development, estimate the trends, new developments in the aviation market but also look at the wider relevant environments in which we move, pick them up and analyse them for the company. And where we discuss with top management, is this a key issue, yes or no? Do we have to deal with that? Must it be incorporated into our strategy? And if that's the case, these issues are taken into account in the next steps. If not, we observe further whether this will change, perhaps in the next few years. This is the general course. And then the next steps are, we have a strategic planning ... no, a business development conference, in which we basically define the strategic goals, where the company wants to go? What are the key planning assumptions that we must consider? And then there is the strategic planning meeting, where the individual divisions, the business units present their strategic planning, prepare.

INTERVIEWER: [hmm]

INTERVIEWEE: It's now the next step that we go through, that takes place at the end of September. And of course all the aspects that we have previously defined, they all are being addressed then in the strategic planning of the individual business units.
INTERVIEWER: [hmm]

INTERVIEWEE: Well, a big issue in recent years has been the subject of

customer satisfaction and passenger satisfaction. Great to have you here.

INTERVIEWER: Right.

INTERVIEWEE: Thus the strategic planning objectives are clearly defined for the development; clear indicators are then incorporated into the strategic plans of the individual business units. They formulate their strategies so that hopefully ...

INTERVIEWER: [ahem]

INTERVIEWEE: the objectives are achieved.

INTERVIEWER: Is there the issue of older passengers being placed, too?

INTERVIEWEE: No, not intentionally. Not at the moment, no.

INTERVIEWER: Today’s older passengers are fitter and richer. What is your company doing to explore the market potential of this passenger group? Are you developing any specific services or products for older passengers? How can the strategy process of your company be changed to accommodate the wishes and demands of older passengers?

INTERVIEWEE: Yes, that's why we do participate in this PASS project, to investigate precisely that. Because who exactly are these older people, what do they want? What do they think? In which direction should it go, where do we see opportunities where do we see risks? And if in this year

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INTERVIEWEE: when we have completed the first phase, of this analysis, then we will look at whether this is something that is interesting for the company or is not it. So I'm very glad that we do this project. Then we see clearly ... I would say the problem in aviation is that everything is dependent on a number of trends. Yes. If in China a sack of rice falls down, we immediately see that here in Frankfurt in the passenger numbers.

INTERVIEWER: [hmm]

INTERVIEWEE: That is, they can talk and discuss every social trend, and everything has an impact on the aviation sector. And there are really important ones.

[Phone rings]

INTERVIEWEE: Oh sorry ... out. Ah ... that's the challenge ... to identify the right ones.

[Pause]

INTERVIEWER: How do you think an airport can maintain its competitive position? What new products or services would enhance the passenger experience in the eyes of the older traveller?

INTERVIEWEE: I cannot even say that exactly. How can an airport remain competitive ... [ehm]?

INTERVIEWER: You said just it; it is ultimately just a matter of price and network. Is that so?

INTERVIEWEE: Well. There are certain basic factors that are clear. Like what we have suffered from all these years, if you cannot offer in a growth market, if you have no capacity, then you are not competitive anymore at some point. Yes. If you charge higher prices than the rest, you are also at some point not competitive anymore. Those are the basic factors. We need a terminal, the processes must be right, the basic factors ... [ehm] If the basic factors are right and at most airports the basic factors are right, at a few they are not. Then there are the so-called premium factors. I think that is important even for a traveller. I am very sceptical that then these factors cause a passenger to book a certain flight through a specific airport rather than another. I do not think that those are really many. And I also think that you have to watch very closely what factors are there for which groups. And these are not the same for all groups. Since you can burn a lot of money as an airport in very many ways. Because it is a relatively large number of people and they have all the time in the world and you can offer them quite a lot. Yes, starting with a massage on to the wine shop, you name it. [Ehm] You have to find out about the things that are necessary for the various target groups at the airport and to identify those that are important; this is a fine art. I think, in that respect, the airports are at the very beginning. Be systematic in this end time and devote time, to come up with sound market segmentation and to say which customer segment needs what. And what exactly is marketing bullshit, and what can be disregarded - nobody needs it and it just costs money. Other industries are ahead there. We are just now going through that process with all its extreme forms.

INTERVIEWER: [hmm]

INTERVIEWEE: And they say ... pfff, it is the principle here to make the passengers happy; then they will come again. That's nonsense, of course; there are people who say what all that nonsense is about? I'm building a terminal here with concrete and then the aircraft will come and with them the passengers.
INTERVIEWER: Yes. These are the extremes.

INTERVIEWEE: And somewhere in between is the truth.

INTERVIEWER: Yes, that's true. That is again the differentiation that we

have just spoken about. With the ... does an elderly passenger really want to be approached differently from another? Because ultimately it is yes, oh I'm old, I have been categorised, and I wear a stamp.

INTERVIEWEE: Yes, I do not know. I think we have a variety of segments, regardless of age. Because intention to travel and the justification is not dependent on age. Yes, when I travel on vacation, I'm different and I expect different things from my airport than when I am on a business trip. And even in old age, people still travel on business. What do I know if he wants to sell his home in Majorca, I do not know that ... maybe he then has other demands on the airport as when he flies to Andalucía to play golf?

INTERVIEWER: [hmm]

INTERVIEWEE: And to filter these customer segments, to say what exactly what they expect, what their attitudes are, what they expect from the airport, where opportunities lie, what are risks, how can I generate what with that business? All airports are at the very beginning in that respect. We also note that every airport is a little bit into experimenting at the moment. Many do much, we also do that. In order to see how I position myself in this world.

INTERVIEWER: Airports around the world?

INTERVIEWEE: Worldwide, indeed.

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INTERVIEWER: Interestingly, Singapore Airlines has just removed its self-service check-in kiosks from Changi Airport due to low levels of usage. Do you think that this is the right strategic move? Do you see a return of the old-fashioned personal service provision with fewer automated do-it-yourself processes? How do you feel about the role of these new technologies? Do they add value as expected to your passenger processes?

INTERVIEWEE: I do not think that this is a general trend. [Ehm] I think that there is a small group of passengers who find that to be good and welcome it. For those it will be offered. The masses will get used to it, though, that you must do many things yourself. [Ehm] And they can handle that. So frankly, I would prefer, doing it at home rather than having to deal with a rude check-in lady.

INTERVIEWER: [laughs] Solves the problem by itself ... that's true of course.

INTERVIEWEE: Have to bother and then still have to stand in line.

INTERVIEWER: And I can choose my own seat at home.

INTERVIEWEE: Yeah. I think that this is a habituation process; the more a society decides to choose a technically inclined path, and the more the passengers are asked to participate. And there will be a small group, rather older than younger people because they have more money, who says pfff, leave me alone with the nonsense; I want to talk to someone. For them you will also need to make an offer, but it will not be the majority.

INTERVIEWER: We now move on Frankfurt Airport.

INTERVIEWEE: Yes.

INTERVIEWER: In your experience, to what extent does the current design of passenger processes at Frankfurt Airport not take the needs of older passengers into consideration? Can you describe an example when you thought that a passenger at Frankfurt Airport needed to be addressed differently because of his or her age?

INTERVIEWEE: Oh. You have to ask me that question maybe in a year, and then I can maybe give you some examples. [Laughs]

INTERVIEWER: So long distances are indeed an issue?

INTERVIEWEE: Long distances are an issue. Because ...

INTERVIEWER: Well, if you cannot think of anything else ...

INTERVIEWEE: No, I do not think that the group is different due to their age. Long distances are also unpleasant for young people. For older people, perhaps a little more so. Orientation is certainly not optimal. This too is an issue for younger people, older even more. Those are the two main aspects that I can see that we have to work on. The factors are basic and everyone expects to see them fulfilled. Reasonable orientation, good processes and I do not want to walk two kilometres through the terminal.

INTERVIEWER: The next question now relates to the service innovation campaign ‘Great to have you here’. You have just mentioned it yourself, too. It consists of four key projects.

INTERVIEWEE: Yeah.

INTERVIEWER: I probably do not have to tell you ... friendly and attentive are the first one. How do you think Frankfurt Airport is currently performing in this area? Can we be friendly and attentive as Germans?
INTERVIEWEE: Yes ... I think so. I think we make good progress. In all respects, it was good that we have initiated the project. Through the project we learn which points are important. But one must also show willingness to drop the points when nothing was achieved by them ... that you did them but they have brought nothing...

INTERVIEWER: Free water on arrival?

INTERVIEWEE: I do not know ... I am thinking more about Happy Moment, which was …

INTERVIEWER: Yes, yes exactly.

INTERVIEWEE: There is a bag of gummy bears ... if you do that ...

INTERVIEWER: That fizzles?

INTERVIEWEE: It fizzles out. You can certainly make more with the money in other places.

INTERVIEWER: [hmm]

INTERVIEWEE: And this is the process we find ourselves in. This can be seen, this is an important issue, that it offers opportunities, but we have not yet found the one and only real access. And where you say ... in the online world, they say the killer app.

INTERVIEWER: [hmm]

INTERVIEWEE: That's why we have also made it very broad. These four key projects, as we have designed the programme, that's all there is. And we have not said one thing is more important than the other three or so. We have not dared to do that yet; this will be the challenge for the next few years.

INTERVIEWER: For how long is it designed to be in place?

INTERVIEWEE: Yes, that has not ended yet.

INTERVIEWER: Oh [laughs].

INTERVIEWEE: [laughs] What we are doing now, is that we segment the passengers in a sharper way than in the past. I do not know if Mrs [...] has already told you that?

INTERVIEWER: No, I have not spoken to her yet. She is still on my list.

INTERVIEWEE: That's certainly a very important basis to continue the project. We discuss at the very moment, I'm not up to date, five or six passenger segments ... what we say …

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INTERVIEWEE: there are so many groups of passengers with similar needs and aims; we need to really tailor our offer. This is now the status

in the project and this is a very important milestone.

INTERVIEWER: [ehm]

INTERVIEWEE: Interestingly, however, we have decided against defining the elderly or senior citizens as a single target group. Because all analysis has shown that age is no criterion. The needs and opinions of older people, and we have conducted passenger surveys with them, that they do not differ substantially from those of the younger people. There is always another aspect to it, an overarching motivator for the reasons that cause a person to travel. And that's very exciting.

INTERVIEWER: That's interesting.

INTERVIEWEE: You can also have a little talk with Mrs [...] who works here in market research.

INTERVIEWER: Yes, I know her well.

INTERVIEWEE: You know her. She is deeply immersed in analysing everything. Very, very much so, even with this older group because originally we wanted to have them as a target group, but it turned out ... Pfff. It does no good because it is such a heterogeneous group that is like having to sub-divide the whole passenger group once again.

INTERVIEWER: I have done interviews with Airline2 as well with flight attendants, who said that, in part, the aircraft comes in from Toronto, with many Indian passengers flying to Delhi or Bombay. Partially they come in with 40 wheelchairs on one airplane.

INTERVIEWEE: Yes.

INTERVIEWER: Parked on the apron. FraCares cannot handle that. I will speak in parallel with FraCares as well, but this starts off certain processes in our company. It means that connecting flights are missed, that the passengers do not arrive at the airport. Mostly older ones, frail ones. Whether they really need a wheelchair is another question. But then we get a reputation in that small market, certainly, oh, I won’t travel via Frankfurt again.

INTERVIEWEE: Yes, of course those are issues that we must, of course, take up.

INTERVIEWER: So. Operational issues do have ultimately an impact?

INTERVIEWEE: Yes.

INTERVIEWER: Yes, but I am happy to talk with Mrs [...] about what she has found out.

INTERVIEWEE: [nods]

INTERVIEWER: This means that out of these four key issues there is not a single one that would have specifically addressed the elderly passenger?

INTERVIEWEE: [whistles] I did not really know.

INTERVIEWER: Nope. Don't worry; I will address that with KMA [the marketing department of Fraport AG].

INTERVIEWEE: Yes. I do not know. Because, as I said, all the analysis that I've been looking at tells me that they there is not that one and only old person. There are various groups among the elderly as well as among the young ones. Among the old ones, you will see the completely moronic seniors who can barely walk but there are also the ones who are fit at the age of 65 who somehow have made millions, and fly three times a month around the world to play golf. And now ... to throw them all into one pot would be completely wrong. And they have different requirements for the airport, the golfer knows his way around, and know how an airport works. When in doubt, such a store does not matter; he just wants to get to the gate similar to a business traveller. The other one probably needs to be carried to the gate in extreme cases.

INTERVIEWER: Then we come almost to the last question. That is the question now with PASS. [Ahhh] The initiative of the federal government.

INTERVIEWEE: Yes.

INTERVIEWER: It focuses on the design of intermodal interfaces within complex infrastructures such as airports and train stations. Part of this initiative is the so-called PASS project at Frankfurt Airport. PASS stands for 'Personalised assistance system and services for mobility in old age' and it makes - via an easy-to-use mobile device - various types of auxiliary information available to elderly passengers to ease their journey. What is your judgement of such a service offering? Is it making a difference to the older passenger's experience? Am I wrong in assuming that you face it all very positively and that you think that it is being accepted?

INTERVIEWEE: Yes. We do this to try it out. I would say so. It is a trial and I think if we had not gotten the money, we might not have done it. As such, these funds may be helpful. Because honestly, we still cannot assess whether this is a thing that older people need. We want to design it like that, Mrs [...] has told you so, and that there will be some sort of device, a gadget

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INTERVIEWEE: or whatever.

INTERVIEWER: Just when booking through travel agents.

INTERVIEWEE: Yeah.

INTERVIEWER: I will get something into my hands when I arrive at the airport or train station.

INTERVIEWEE: Yes. And we are still wondering what we integrate there. The way to the airport is in there, the integration of services. If I push a red button, then someone comes for help. So, let's see how we embellish it. And yes, I believe that this can be a key to enable older people to get rid of their fears to a certain extent. [Ehm] But I'm honestly not sure if this is not ... how shall we say, not discriminatory. Yes, if you are in a travel agency and the woman there gives you a device into your hands, here you are, you are in need of help ... whether they like it, I do not know, but we'll see. That is why we do this - in order to gain experience and to try out certain things. This you cannot do otherwise as a company. So far it's a nice project.

INTERVIEWER: One last question. How do you work hand in hand with other providers or agencies in order to optimise the processes for older passengers? Can you please provide examples of effective cooperation between the various service providers at Frankfurt Airport? What are the challenges, if you would like to offer a seamless service? What can be improved? With the federal government, you are sitting at the table with several players.

INTERVIEWEE: Yes, yes. Clearly. We found ourselves at the beginning, at the very beginning. For them, every passenger is the same, a mass that needs to be handled. To teach them that we have different types of passengers, this is difficult [laughs].

INTERVIEWER: Okay.

INTERVIEWEE: The ... I do not see the necessity to do that with the older passengers yet, because as a group they are not a mass. We need to teach them the basics first today. Yes, these are the transfer passengers, these originate here, this is someone who knows the airport, and this is a business traveller who just wants to get to the gate. Has no other interests. I do have to explain a lot. [Ehm] Since we are still completely at the beginning. It is therefore important that we manage that for ourselves and know this segmentation; we have these and these passengers at the airport. And we have to deal with them in such and such way...

INTERVIEWER: [hmm] Thank you. That was the last question.

INTERVIEWEE: Should I add something?

INTERVIEWER: If you have missed anything?

INTERVIEWEE: No, it has ... fascinating topic. I envy you a bit because it really is an issue for the future. On the other hand, I pity you because it is such a mass of questions and yes, influencing factors that you have to consider.

INTERVIEWER: Yes, I must be careful that I not drown in all that data, that's true. The focus is not easy; I also shift between strategy and marketing. Because many questions address issues in marketing as well.

INTERVIEWEE: Yes, yes. Especially if you get into the whole differentiation, looking at that data ... I am confident that this will be successful. Yes, I'm very excited. I wish you all the best. And I think this is really important.

INTERVIEWER: Thank you.

INTERVIEWEE: To get the focus narrowed down as much as possible. Also look once again at the GfK [marketing institute] data, which are very, very good. There you will see what is out there as far as the elderly are concerned. Just as in all age groups, there are completely different needs, and people. And yes, that's why the treatment of this older target audience is not so easy.

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APPENDIX 4 Overview of the Interviews

Pilots			
PilotManager1	Airline1	02/07/2011	21 minutes
PilotPassenger1	Private	23/09/2011	34 minutes
PilotPassenger2	Private	14/09/2011	23 minutes
PilotPassenger3	Private	14/09/2011	21 minutes
1st Round of Interviews			
Frontline1	Airline2	25/05/2012	34 minutes
Frontline2	Airport1	22/06/2012	27 minutes
Frontline3	Airline3	13/07/2012	19 minutes
Frontline4	Airline4	29/07/2012	21 minutes
Frontline5	Airline5	05/08/2012	23 minutes
Frontline6	Airport1	06/08/2012	30 minutes
Frontline7	Airline5	12/08/2012	30 minutes
Frontline8	Arline6	17/08/2012	34 minutes
Frontline9	Airline3	25/08/2012	33 minutes
Frontline10	Airline3	25/08/2012	32 minutes
Frontline11	Airport1	27/09/2012	35 minutes
Manager1	Airline5	09/06/2012	32 minutes
Manager2	Airline7	10/06/2012	29 minutes
Manager3	Airport1	27/06/2012	34 minutes
Manager4	Airport1	03/07/2012	44 minutes
Manager5	Airport1	05/07/2012	28 minutes
Manager6	Airport1	12/07/2012	55 minutes
Manager7	Airport1	13/07/2012	33 minutes
Manager8	Airline1	13/07/2012	39 minutes
Manager9	Airline4	28/07/2012	27 minutes
Manager10	Airport1	31/07/2012	44 minutes
Manager11	Airport2	21/08/2012	55 minutes
Manager12	Airport1	05/09/2012	63 minutes
Manager13	Airport1	12/09/2012	38 minutes
Manager14	Airport1	13/09/2012	28 minutes
Manager15	Airport3	24/09/2012	31 minutes
Manager16	Airport1	18/10/2012	20 minutes
Passenger1	Private	18/05/2012	22 minutes
Passenger2	Private	18/05/2012	22 minutes
Passenger3	Private	16/08/2012	19 minutes
Passenger4	Private	16/08/2012	22 minutes
Passenger5	Private	15/10/2012	41 minutes
Passenger6	Private	29/10/2012	14 minutes
Passenger7	Private	26/11/2012	20 minutes
Passenger8	Private	24/11/2012	20 minutes
Passenger9	Private	24/11/2012	20 minutes
Passenger10	Private	24/11/2012	30 minutes
Passenger11	Private	24/11/2012	27 minutes
Passenger12	Private	24/11/2012	14 minutes

Passenger13	Private	24/11/2012	38 minutes
2nd Round of Interviews			
Passenger14	Private	25/05/2014	14 minutes
Passenger15	Private	26/05/2014	12 minutes
Passenger16	Private	31/05/2014	17 minutes
Passenger17	Private	01/06/2014	13 minutes
Passenger18	Private	01/06/2014	10 minutes
Passenger19	Private	01/06/2014	13 minutes
Passenger20	Private	01/06/2014	19 minutes
Passenger21	Private	02/06/2014	15 minutes
Passenger22	Private	02/06/2014	13 minutes
Passenger23	Private	18/06/2014	13 minutes
Passenger24	Private	18/06/2014	17 minutes
Passenger25	Private	18/06/2014	14 minutes
3rd Round of Interviews			
Passenger26	Private	04/11/2014	27 minutes
Passenger27	Private	06/11/2014	8 minutes
Passenger28	Private	06/11/2014	7 minutes
Passenger29	Private	06/11/2014	9 minutes
Passenger30	Private	09/11/2014	13 minutes
Passenger31	Private	09/11/2014	11 minutes
Passenger32	Private	12/11/2014	12 minutes
Passenger33	Private	12/11/2014	12 minutes
Passenger34	Private	12/11/2014	17 minutes
Passenger35	Private	17/11/2014	17 minutes

APPENDIX 5 Overview of the Observations

1st Round of Observations			
1	No assistance with baggage. Two passengers had to drag their baggage through the terminal.	Terminal 2, hall D and E, way to Airline8 check-in	23/10/2013
2	Aggressive beggar approaches older passengers for their baggage cart.	Terminal 1, hall C, in front of Airline9 check-in	24/10/2013
3	Disoriented passenger does not know whom to ask for help. Member of service staff provides assistance.	Terminal 1, hall B, in front of Airline10 ticketing	11/11/2013
4	Passenger cheats regarding her level of mobility to claim complimentary assistance.	Terminal 1, de-boarding a Airline3 flight, in transit B	27/11/2013
5	Young man helps passengers with their luggage at the baggage carousel.	Terminal 2, hall D, in baggage claim	09/12/2013
6	Upon arrival by train, passengers pass with ease through the process.	AirRail Centre, check-in area	12/12/2013
7	Passenger gets no assistance with her baggage. Has to carry it down the stairs by herself.	Terminal 1, in departure hall B, going down to arrivals	17/12/2013
8	Passengers make use of gate taxis provided by FraCareServices without problems.	Terminal 2, in front of Airline11 check-in	18/12/2013
9	Airline crew helps passengers down the stairs. Elevator is broken, no help is provided by airport staff.	Terminal 2, in arrivals before immigration	26/01/2014
10	Payment for baggage carts is perceived as the airport ‘just wanting to make money out of you’	Terminal 2, in baggage claim D	26/01/2014
11	Passenger has problems walking to her connecting gate. Long walking distances.	Terminal 1, in transit B/C	29/01/2014

12	Group with wheelchairs have problems with the service offering for passengers with reduced mobility.	Terminal 1, in front of Airline9 check-in	03/02/2014
13	Passengers arrive early at gate; need reassurance from staff. Eat their own sandwiches in the gate area.	Terminal 1, A gates departure for a Airline5 flight	04/02/2014
14	Passenger in wheelchair passes through security lane designated for staff.	Terminal 1, B gates at security	04/02/2014
15	No special service provided to passengers during a strike. Chaotic conditions in the terminal.	Terminal 1, inside the halls before security	21/02/2014
16	Porter service is too expensive for passengers.	Terminal 1, arrivals, in front of Welcome Centre	07/03/2014
17	Passengers make fun of ‘virtual assistant’. No longer want to travel ‘if the world comes to this’.	Terminal 1, in front of Airline9 check-in	11/03/2014
18	Group uses self-service check-in kiosks.	Terminal 2, in front of Airline12 check-in	13/03/2014
19	Passengers check-in their bags themselves at a kiosk.	Terminal 1, in front of Airline3 check-in	20/03/2014
20	Passenger is eager to learn the automated self-boarding process.	Terminal 1, boarding gate Airline3, B gates	20/03/2014
2nd Round of Observations			
21	Daughter helps passenger through the security check.	Terminal 1, security check-point, hall A, before screening	22/04/2014
22	Lack of standards at security check is confusing for passengers.	Terminal, security check-point, hall A, after screening	22/04/2014
23	Passenger faces problems and no assistance is available to help her with boarding.	Terminal 1, Z gates, boarding area and apron in front of an Airline5 aircraft	05/05/2014
24	Staff do not let passengers sit down as they are not consuming anything.	Terminal, hall C, coffee shop	12/05/2014
25	Long wait at passport control. Next time passengers will go by car. ‘Flying is just no fun anymore’.	Terminal, hall, in front of passport control	13/05/2014

26	Passengers wait in long queue at check-in.	Terminal, hall C, departure level, in front of Airline9 check-in	14/05/2014
27	Passengers appreciate travelling in a group. Holiday begins in the air.	Terminal, hall B, departure level, in front of Airline3, Group check-in counter	14/05/2014
28	Request for ad-hoc wheelchair service is turned down.	Terminal, hall C, departure hall, in front of Airline13 check-in counters	19/05/2014
29	Long walking distances to get to the toilets exhaust passenger.	Terminal, hall B, departure hall	21/05/2014
30	Passengers receive private help from the car to the check-in.	Terminal 2, car lane, passenger drop-off, in front of hall E, departure level	23/05/2014
31	No special service for visually impaired passenger provided by the airport. Travel companion helps him.	Terminal 1, in front of Airline9 check-in	26/05/2014
32	Passengers perceive duty-free shopping as expensive. Hurry to the gate.	Terminal 1, at the Duty-free shop in B	28/05/2014
33	Passenger has problems reading the timetables for the trains. Help is provided by fellow passenger.	Terminal 1, hall C, arrival level, in front of an information screen	30/05/2014
34	‘Traveller’s aid’ provides service to a passenger and guides her on the way.	Terminal 1, hall B, departure level, in front of the ‘Travellers aid’ counter	16/06/2014
35	Automated system causes confusion among passengers.	Terminal 1, hall A, departure level, in front of security	18/06/2014
3rd Round of Observations			
36	Increased security measures cause problems to passengers. They do not want to fly anymore in the future.	Terminal 1, hall B, departure level in front of security	05/11/2014
37	Passengers have no tickets as online booking has gone wrong.	Terminal 2, hall D, in front of Airline7 ticket counter	07/11/2014

38	Dirty toilets are a shame.	Terminal 1, hall B, arrival level, women's toilets	11/11/2014
39	Passenger does not hear his name being called as it is too noisy. Almost misses flight.	Terminal 1, departure level, at gates, gate B44, Airline5 boarding	11/11/2014
40	No visa for Cuba. Passengers had relied upon help from travel agency.	Terminal 1, departure level, travel agency hall C	14/11/2014
41	Passenger checks in without problems at the counter.	Terminal 1, departure level, check-in counters Airline13	15/11/2014
42	Passengers pass through all customer contact points. No problems although the distances to the gate are long.	Terminal 1, departure level, from check-in in hall A to boarding gate in hall C, Airline3 flight to Montreal	15/11/2014
43	Grandson helps passengers with automated check-in.	Terminal 2, departure level, hall D, in front of Airline8 check-in	16/11/2014
44	Service provided to passengers with reduced mobility runs flawlessly.	Terminal 1, departure level, hall A before security, FraCareServices lounge to Gate B14	16/11/2014
45	Distances and broken infrastructure makes journey through the airport to the train station a difficult one.	Terminal 2, arrivals level, hall E, luggage arrival to long-distance train station	18/11/2014
46	Passengers do not trust information that is provided by flight information.	Terminal 1, hall B, duty-free shop to gate B41	19/11/2014
47	Passengers do not like the offer at the restaurants. Perceive it as too expensive.	Terminal 1, hall B, food court, after security	19/11/2014
48	Passengers go on an expensive cruise but fly in economy class.	Terminal 1, hall A, business and economy check-in counters Airline3	20/11/2014
49	Travelling is getting too stressful. Passengers are forced to repack or pay for excess baggage.	Terminal 1, hall C, departure level, in front of Airline9 check-in	21/11/2014

50	Passengers have no problems using new self-service technologies.	Terminal 1, hall C, departure level, in front of Airline14 check-in	21/11/2014

APPENDIX 6 Results of the First Cycle of the Coding Process

Airport-airline relationship
Automatisation and self-service
Awareness of population ageing
Business opportunity or challenge
Changes in travel behaviour
Changing role of an airport
Commercial offerings
Competition among airports
Expectations of service
Expectations of the airport and airline
Expectations of the tourism experience
FRA front door
Future strategies
Infrastructure and atmosphere
Language problems
Needs and demands for a senior-friendly passenger process
Non-commercial offerings
Parking
Passenger with reduced mobility
Pay for service
Personal service
Price-conscious
Ranking different points of contact
Satisfied and content
Senior-friendly
Service quality
Signage
Singled out and discrimination
Standard passenger process
Stress and uncertainty
Value in the experience
Waiting
Wheelchairs

APPENDIX 7 Results of the Second Cycle of the Coding Process

Description of the older leisure traveller:

People are getting older and more demanding; they spend money on travelling, however, they are price-conscious, do not want to be addressed differently as long as they are not disabled and are still fit to walk. They feel stressed by the airport processes and do not consider it to be part of their overall holiday.

Level of satisfaction:

Older passengers are highly satisfied with the airport; for many, Frankfurt Airport is at their front door and the flights offered enable them to see the world while they are still fit to do so.

Price consciousness:

Although presumably they have the money, they are highly-price conscious and the ticket price is important to them. They expect complimentary services and think that products and services at the airport are too expensive.

Expectations of the airport:

'Being processed' through the airport is a necessary evil that is not part of the actual holiday experience. The airport is a means to an end; like a train station, it provides an infrastructure. It does not address the needs of older passengers and it is expected that the airline will service the passengers.

Ranking the importance of the different points of contact:

In order of importance the service points are check-in, passport control, customs clearing and security screening, luggage retrieval, spacious gate areas, availability of shops, duty-free shopping. Food becomes more important

Attitude towards automatisation and self-service technology:

Self-service technologies are unstoppable as part of the process optimisation and cost reduction. It is a habituation, re-education process for older people while help is still provided to them.

Treatment of the older leisure traveller within the regular passenger process:

The standard passenger process works for the older passenger; no special services are offered unless they are disabled and ask for assistance.

Personal service:

The older they are, the more they prefer personal service and human interaction.

Commercial offerings:

Airport and airline interests collide with increased commercialisation posing problems upon operational processes. Older people are aware of airport turning into shopping malls but are not too keen on the retail offer.

Non-commercial offerings:

Any help is greatly appreciated that eases the way through the terminal. Free electric carts and shuttles are of utmost importance while the complaint is made that you have to pay a deposit for baggage carts.

Infrastructure and atmosphere:

The terminal buildings are, to varying degrees, facing problems to due infrastructural constraints. Distances and changing of levels in particular pose problems. The atmosphere is perceived as stressful, hectic and crammed. It is a juggernaut for some, a ‘non-place’ to be.

Signage and language problems:

Signage needs to be clear, simple and understandable. It cannot be taken for granted that older passengers have a good command of the English language.

Waiting:

Nobody likes to wait, especially when you are worried that you are going to miss your flight.

Wheelchairs:

Wheelchairs are for people who cannot walk and for those who feel safer when someone is looking after them.

Passengers with reduced mobility:

Passengers with reduced mobility cannot be discriminated against; they have a right to assistance and a right to mobility in general. FraCareServices provide this service for free at Frankfurt Airport.

Management's reaction to the older leisure traveller:

Management is slowly learning about population ageing but does not know yet how to deal with it. Standard processes appear to suffice while segmentation of the group is difficult.

Collaboration at the airport:

Seamless-service and consistent behaviour towards the customer are important. Some interests collide but collaboration among frontline staff works well.

Competition among airports:

Competitiveness is about airlines, ticket price, connectivity, good infrastructure and reliable processes. Retail offering is used not only as a revenue generator but also for image purposes.

Business opportunity or challenge:

There might be a lucrative business opportunity to cater to the specific needs and demands of older passengers at the airport; however, clear specification and differentiation (against free PRM service) are necessary. Ageing might pose a challenge to the standard passenger process when numbers rise in the future; however, airports do not see that effect yet.

Future strategies:

Older people will get used to self-service technology. In the meantime, they will receive help. Increased commercialisation and automatisation are unstoppable as they cut down operational costs for the airlines. It will be interesting to see whether airports support the airlines' strategies in that regard or if they come up with their own strategies on how to deal with the older passenger. Older passengers will demand more individualisation; they do not want to be simply 'processed'. Much more insight into their expectations and what creates value for them in the experience is needed.

APPENDIX 8 Coding Example

Quotations by Passenger13	Holistic Coding: Initial Code	Broad Theme	Pattern Coding: Category	Theme
'Yes, earlier this all was very easy when I was flying for two, three times a week. Back then you just had your boarding passes and everything was clear'.	Automatisation	The current passenger processes and offered services are sufficient	Attitude towards automatisation and self-service technology.	The treatment of older leisure travellers within the regular passenger process
'Nowadays it is much harder for older people to get the boarding pass. My children print it on the PC, all is well. But if it weren't for them, I would be in trouble. Like people who cannot handle the PC and have to travel have quite a problem nowadays'.	Automatisation and self-service		Help is still provided to them. Self-service technologies are unstoppable.	
'[I]f I would not have my kids who would help me, when you print the boarding passes, etc. then I would be lost at the airport quite a bit'.	Automatisation		Help is still provided to them	
'Well, I must say, it used to be easier for me as a passenger back then. [Eh] I already had my boarding pass in my hand. And ... or got it at the counter in a relatively easy way. [Eh] And then I had my ticket and I was able to go through, that was easy. Nowadays if you do not have one or do not know how to operate the computer, you are pretty much lost, I think. And then everything is very complicated. I mean if you can deal with the computer, you can get the boarding pass printed out as early as 24 hours in advance, it is also quite simple. However, you need to know how to do that. That is not senior friendly I think. And then the printing out …however, you do have staff there at Frankfurt...'	Automatisation and self-service		Attitude towards automatisation and self-service technology. Self-service technologies are unstoppable. It is a habituation, re-education process for older people. Help is still provided to them.	
'That's certainly a good thing for young people, but I do not know if older people are well served with that as they usually cannot deal with a smartphone. And with things like that. So, personally speaking, I would not necessarily say that this is an improvement for older people. People who had to deal with that during their adult	Automatisation		Attitude towards automatisation and self-service technology	

life, for them it is certainly not a problem, but for normal average people, older average persons, I would say that this probably does not do anything at all. In my opinion'.			It is a habituation, re-education process for older people.	
'No, maybe the fact that because I've flown so much, flying is for me still a great experience. And I like being at the airport. However, it has become much more complicated, I must say. Yes, yes, that is ... and I mean it's obviously easier for the airlines to do everything over the internet and I know it now from my daughter, who is a professional and a has to do a lot of traveling, she flies a lot. She gets it all on her mobile phone. Might be something I simply cannot do [laughs] because I still prefer having that piece of paper in my hands'.	Automatisation and self-service		Self-service technologies are unstoppable as part of the process optimisation and cost reduction. Attitude towards automatisation and self-service technology	
'When you get older you are ... not so enthusiastic about that [new technologies]'.	Automatisation		Attitude towards automatisation and self-service technology	

(Summarised from Interview Data by Passenger13)