

Netflights



UK Airport Review



REPORT 2019

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Introduction

Welcome to the inaugural Netflights UK Airport Review.

This is the first of many annual reports casting an informative light on how airports across the country are performing against a unique set of criteria, which we expect to help passengers – from globetrotting business travellers and families going away on their one big holiday of the year, to first timers and travellers with accessibility needs – to travel more easily.

Because it matters. In an increasingly globalised and interconnected world, airports are essential to the way we travel for both pleasure and business – domestically and internationally. Indeed, this fundamental shift is already underway and records are being broken – in 2018 alone, for example, 292 million passengers passed through UK airports, compared to the 211 million terminal passengers recorded in 2011. More of us taking to the skies than ever before and we're also flying a lot more often than we used to –

meaning more of us are spending more time at airports than at any other time in aviation history.

That growing familiarisation is fundamentally changing our relationship with airports, as well as our expectations of them, regardless of whether they're a huge airport like London Heathrow or a markedly smaller one like Durham Tees Valley. The aim of this report is to explore how airports are adapting as a result of this ongoing dialogue with their customers.

To do this we scored 30 of the UK's airports across six areas – accessibility, family-friendliness, wellness, facilities, lounges and food – which are representative of the modern day airport experience. It also allowed us to uncover actionable insights for passengers who place a greater level of importance on certain aspects of their airport experience.



Accessibility



Family-Friendly



Wellness



Facilities



Lounges



Food

With so many variables to take into consideration, getting to this stage has been a technical challenge. In fact, attempting to assess the performance of different airports across multiple categories, all with a distinct set of criteria, has been perplexing, insightful and thought-provoking – which, on reflection, isn't that surprising. Airports are, after all, inherently complex institutions.

That said, we like to think we've done a good job. Judge for yourself by having a read.



Methodology

The research was commissioned by Netflights. It was conducted and overseen by a third party agency between June and August, and is comprised of original desk-based research and a consumer survey. This resulted in a combination of qualitative and quantitative data, which was then fed into models to determine the 'best' airport for each category.

Over 2,000 respondents, aged 16 and over and representing all the main regions of the UK, took part in the consumer survey. It was stipulated that respondents must have had travelled via one of the 15 busiest airports in the UK "in the last year" or "most recently".

These airports were: London Heathrow, Manchester, London Gatwick, Birmingham, Glasgow, Edinburgh, Newcastle, London Stansted, Aberdeen, Cardiff, London City, Leeds Bradford, Belfast City, Belfast International and Bristol Airport.

Note

For our report we have categorised large airports as those reporting annual passenger numbers of more than four million (based on Civil Aviation Authority data from 2018). In turn, small airports have been identified as those reporting less than four million annual passengers.

Overall airport scoreboard

Large airport Small airport Best Worst

AIRPORT	PASSENGERS	OVERALL	ACCESSIBILITY	FAMILY-FRIENDLY	WELLNESS	FACILITIES	LOUNGES	FOOD
London Heathrow	80,124,537	1	3	1	1	2	21	24
London Gatwick	46,086,089	2	5	4	1	4	21	27
Birmingham	12,457,051	3	3	11	8	17	10	24
Edinburgh	14,294,305	4	1	9	1	9	16	30
Glasgow	9,656,227	4	1	6	1	9	21	24
Manchester	28,292,797	6	12	13	8	8	12	27
East Midlands	4,873,831	7	5	15	8	7	24	12
Newcastle	5,334,095	7	5	3	1	3	20	20
Bristol	8,699,529	9	5	17	11	16	12	22
London Stansted	27,996,116	9	16	15	1	9	16	27
Liverpool	5,046,995	11	5	23	11	20	12	13
London Luton	16,769,634	11	5	17	11	21	19	23
London Southend	1,480,139	11	23	25	1	1	4	8
Newquay	456,888	11	14	17	11	13	1	1
Exeter	931,265	15	18	7	11	6	3	8
Aberdeen	3,056,018	16	18	22	25	24	16	19
Doncaster Sheffield	1,222,347	17	22	5	11	4	7	11
Cardiff	1,581,131	18	16	23	25	27	9	6
Glasgow Prestwick	681,715	18	14	2	11	23	26	6
London City	4,820,292	18	23	17	11	17	26	16
Norwich	536,578	18	18	28	25	24	1	5
Southampton	1,991,014	18	18	30	23	15	5	20
Belfast City	2,511,261	23	5	9	11	17	12	16
Belfast International	6,268,960	24	13	11	11	28	25	15
Leeds Bradford	4,038,889	25	23	25	11	13	11	18
Bournemouth	674,972	26	26	27	23	26	26	3
Jersey	1,664,175	26	27	7	11	12	8	8
Isle of Man	836,656	28	28	13	25	29	26	4
Durham	142,080	29	30	29	25	21	5	1
Guernsey	837,615	30	29	17	25	30	26	14

Accessibility

When it comes to airport accessibility, our research paints a largely positive picture with most airports scoring highly for the category – 22 out of the 30 airports we reviewed received a rating of 60% and above.



In general, small and large airports scored well for accessibility.

In general, the UK's larger airports performed a lot stronger than the UK's smaller airports, with 10 of the highest scoring 11 airports among the busiest airports in the country.

Edinburgh and Glasgow topped the category, which is unsurprising given that both airports have pumped significant amounts of money into improving accessibility (and continue to deliver consistently good levels of service all year round). They were closely followed by Birmingham and London Heathrow, both recognised by the UK's Civil Aviation Authority (CAA) as 'good' in its [Airport Accessibility Report 2018/19](#).

Beyond the 'big four', there were seven airports in joint fifth place, including Bristol, Liverpool and East Midlands. Out of this group, Belfast City was one of the most notable exceptions, as it was the only small airport to make it into the top five.

In fact, it was an impressive result all around for Belfast City as it was also the only small airport to get a rating of 80% and above for accessibility. Not only did it receive a 'very good' rating from the CAA, it also picked up points for its efforts to improve the airport experience for people on the autism spectrum (which includes developing a [helpful series of videos](#) for passengers travelling with children with autism).

If Belfast City were to invest in an [Eagle 2 Lifter](#) and/or better document its initiatives to support passengers who are hard of hearing or visually impaired in the next 12 months, the airport could find itself transforming the 'big four' into the 'big five'.

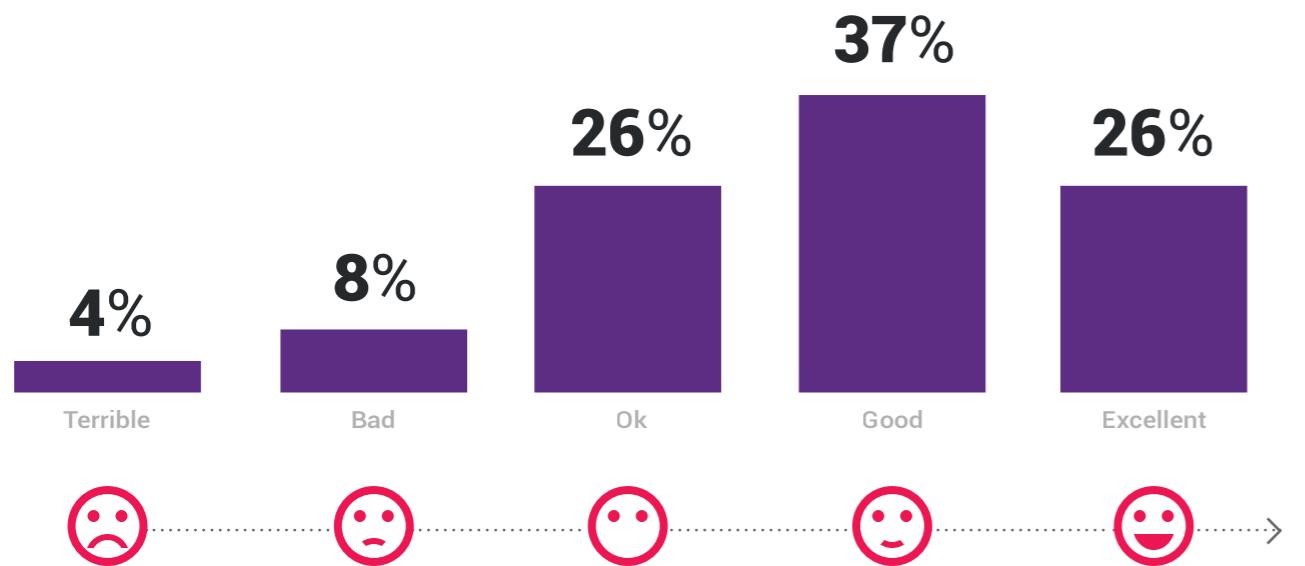


Eagle 2 Lifter

An Eagle 2 Lifter is a purpose-built hoist that has been designed to help passengers with largely severe mobility challenges to be safely transferred from a wheelchair to a seat on a commercial plane – and vice versa.

Continuing with high scoring airports, it's worth drawing some attention to Manchester's surprise performance for accessibility – the airport finished in the top 12 with a strong score of 79%. We've highlighted this as it was the only airport to be classed as 'needs improvement' in the CAA's 2018/19 accessibility report and, additionally, our consumer survey also revealed that when it came to a good/excellent rating for accessibility, it received one of the lowest percentages (33%).

Nevertheless, it is making an effort to change things, moving from, for example, a 'poor' CAA rating to a 'needs improving' rating over the course of 12 months. Also, it's one of the select few airports in the UK that has an [Eagle 2 Lifter](#).



Consumer opinion of airport accessibility experience

Consumer survey data visualisation of the ratings of accessibility in airports and their efforts to help the needs of travellers that require special assistance.

At the other end of the table, Leeds Bradford and London City stand out. Out of the 15 busiest airports, they were the only two that didn't score above 60%. London Stansted was also noticeably adrift from the main pack, but it still achieved a high rating of 71%.

Leeds Bradford had a comparatively low score because we were unable to verify or find any further information on specific services it offered visually impaired and hard of hearing passengers (beyond the standard hidden disability lanyard scheme). For London City it was specifically an absence of both Changing Places facilities and a designated quiet space that saw it score less than other busier airports. As for London Stansted, it dropped points because we were unable to determine whether it had any specific initiatives for hard of hearing and visually impaired passengers. It also hasn't invested in an Eagle 2 Lifter.

Elsewhere, among some of the smallest airports – namely Bournemouth, Jersey, the Isle of Man, Guernsey and Durham – the most common factors contributing to a low score included a lack of quiet spaces and not having Changing Places facilities in place.



Changing Places facilities

The Changing Places Consortium campaigns for Changing Places toilets to be installed in public buildings and locations “where large numbers of people may visit”.

In addition to airports, this includes service stations, sport and leisure facilities and cultural centres.

The facilities are aimed at people with a range of complex disabilities, for whom even standard accessible toilets are limited in scope.

Whether these airports need to invest in accessibility equipment, facilities and services like some of the ones listed above is open for discussion. Consider the Eagle 2 Lifter, which most airports do not have. Is it crucial that an airport like the Isle of Man, whose annual passenger numbers are just under 850,000, invest in this when, for example, Bristol Airport, which receives over eight and a half million passengers every year, also hasn't spent money on an Eagle 2 Lifter?



AP Cymru, an autism charity, have assisted Cardiff Airport staff with extensive training to help them understand what it means to be in an airport for someone with autism.

Founder and Director, Karen Sullivan said: “AP Cymru provided training for the staff at Cardiff Airport including disability desk staff, armed responses, security, check-in staff and all food/retail departments. We created many Autism Champions in each of their departments - the support that we provided to the airport has enabled many families to holiday abroad that had never left the country.”

AccessAble currently offer Detailed Access Guides for 18 UK airports, and hope that more airports will work with them to deliver further change.

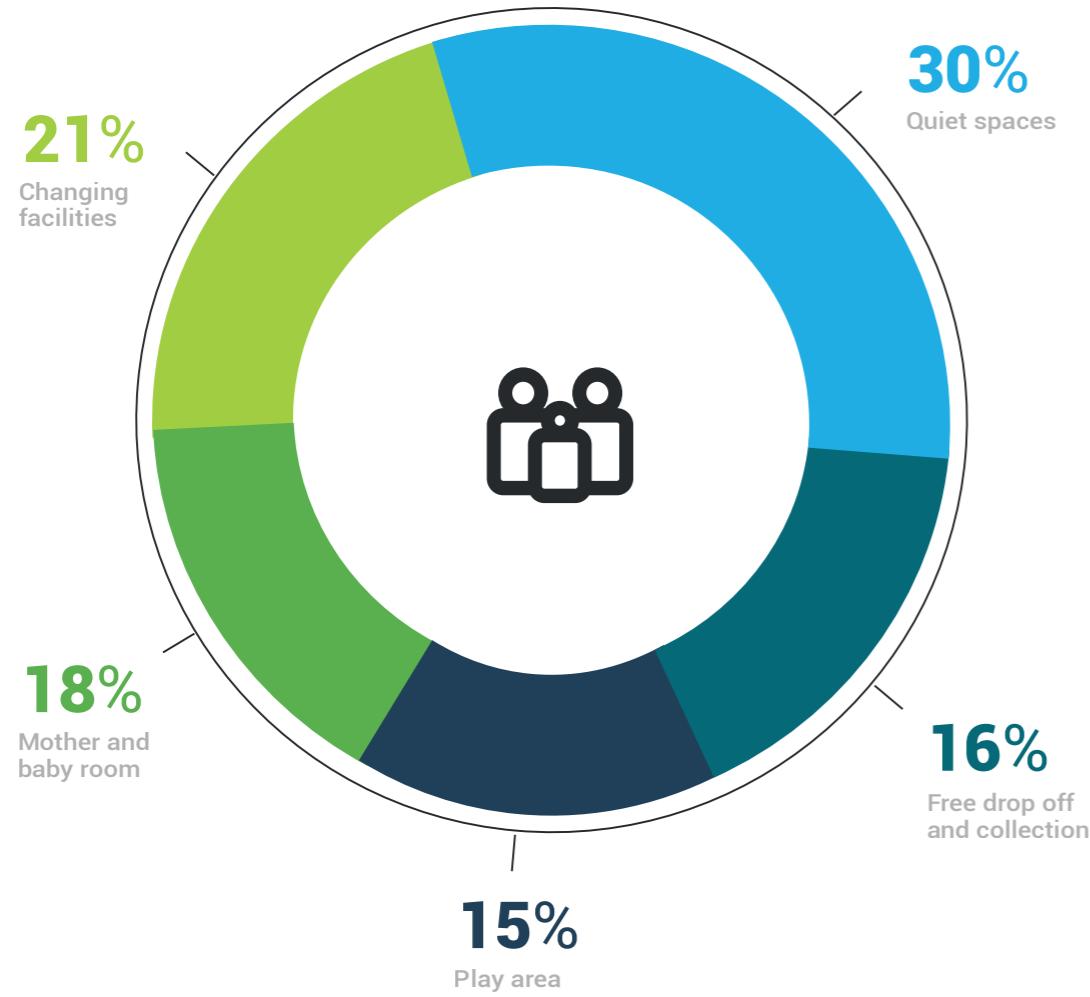
Chairman of the organisation Barry Stevenson said: “If airports provide detailed, trusted Access Guides with lots of photography and ensure it is kept accurate, the passenger experience can be greatly enhanced. Detailed Access Guides allow travellers to plan their journey through an airport before they leave home and in the airport itself, using the App.”

Family-friendliness

With an even split between small airports and big airports at the top end of the table – five of each in the top 10 – family-friendliness was one of the most balanced categories. London Heathrow, the busiest airport in the UK, came out on top, closely followed by Glasgow Prestwick, Newcastle and London Gatwick. Completing the top five was Doncaster Sheffield.

The split of key family-friendly facilities at 30 of the UK's airports

Family friendly facilities	No. of airports that have these facilities
Free drop off and collection	11
Play area	11
Mother and baby room	13
Changing facilities	15
Quiet spaces	21



"

The family-friendly category was one of the most balanced categories.

"

London Heathrow's prime position was to be expected as the airport has set a high bar when it comes to family-friendliness. It has, for example, multiple and appropriately located play areas, baby change areas in each of the terminals, dedicated mother and baby rooms for private and comfortable breastfeeding, and numerous restaurants that generously offer a 'Kids Eat Free' meal deal. Additionally, families at the airport can also benefit from free pick-up and drop-off points as well as unlimited

free Wi-Fi – two supplementary factors that were also considered when scoring airports in this category.

Hot on London Heathrow's heels was second place Glasgow Prestwick, which was the highest scoring small airport for family-friendliness. Among other things, families will find at the airport a play area, baby changing facilities and a quiet space. That said, it could do better with its Wi-Fi offering – it's only free for up to two hours – and making drop-offs and pick-ups free.

8 ways to keep kids entertained

Once you've made it through security and boarding, how do you then keep your kids happy en route? Here are eight ways to keep them entertained on the plane

 Book a window seat	 Pack sticker books	 Bring drinks for take-off and landing
 Pack headphones	 Bring snacks	 Pack some old fashioned games
 Pack a surprise	 Meet the captain	READ MORE www.netflights.com/ blog/8-ways-keep-kids- happy-plane/

For other airports, improvements can definitely be made more specifically with play areas. We found, for instance, that 19 out of the 30 airports we scored for the review didn't have a dedicated play area. While the majority of these were smaller airports, such as Guernsey, Bournemouth and Exeter, out of the 19 without a play area, seven were large airports, including Manchester and London Stansted. It's reasonable to expect that bigger airports would have in place some sort of play area, given the numbers of families that pass through their respective terminal

it's basic facilities, connectivity and/or efficiencies. So, in the context of family-friendliness, this may equate to having baby changing facilities, offering free Wi-Fi and endeavouring to reduce queue times at every stage of the airport journey.

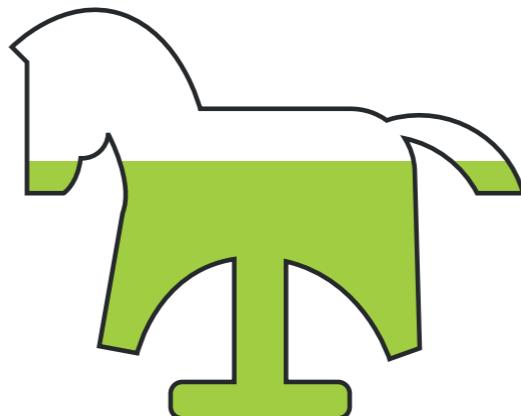
Interestingly, with regards to the last point, smaller airports are actually already making positive inroads. We found, for example, that they tended to score a lot better than larger airports, with 13 out of the highest scoring 18 airports for queue times experiencing annual passenger numbers of less than 3.5 million. Aberdeen and Bournemouth were the two exceptions.

For families, this aspect of the airport experience is vital, irrespective of whether they're at a big airport or a small one. Anything that contributes to a streamlined experience from one part of the airport to another is welcome, especially when you're trying to juggle multiple kids, bags and documents.

Finally, it's important to note that some of the low scores achieved by airports for family-friendliness have to be taken with a pinch of salt – they are somewhat relative to the size of the airport and/or the kind of passengers that pass through their terminal doors. A case in point is Durham. This airport is largely aimed at and used by business travellers. Is it, for example, a good use of space and money to make it more family-friendly? It depends. A play area, for instance, might seem unnecessary for an airport like this, while a dedicated space for breastfeeding is surely worth some consideration? After all, as one mother noted in a 2018 [Guardian article](#), breastfeeding remains both a challenge in airports and in other spaces.

Play areas

19 out the 30 airports we scored didn't have a dedicated play area



doors. In contrast, there's probably less demand and need for family-friendly facilities and services – like play areas and quiet spaces – at smaller airports, which naturally offer a much more pared down airport experience. These airports tend not to focus on or prioritise what can be described as 'airport add-ons' and leisurely aspects of the pre-flight experience. Instead, smaller airports seem to pay more attention to more practical things, whether

Wellness



As we reported in early 2019, the movement of airports into the 'wellness space' is accelerating. Indeed, some of the busiest airports in the world have already responded positively to the growing desire of travellers to stay well on the road, by investing in a range of facilities and services that are designed to make airports feel a lot calmer and more relaxing than they currently are.

This includes spas, gyms and, among other things, green spaces.

This 'wellness pivot' was reflected in some of the high scores achieved by a sizable number of the UK's biggest airports. We found, for example, that nine out of the 15 busiest airports achieved a rating of 75% and above, with London airports, in particular, leading the way.

"Of the seven airports taking the top spot for wellness, four were from London."

65%

of travellers find airports stressful

Of the seven airports taking the top spot, four were from the capital. This included London Gatwick, London Heathrow, London Stansted and London Southend. The latter was striking as most small airports tended to rank relatively low for wellness – which, given financial and physical space restraints, isn't perhaps that much of a surprise.

Moreover, bigger airports are markedly busier and more stressful than smaller airports. Based on that reality, there's arguably a greater need for larger airports to have a more robust response to wellness in place – and for them to also take the lead when it comes to developing wellness initiatives.

For smaller and quieter airports, like Durham and the Isle of Man, the opposite is probably true. There's perhaps less of a need to invest in wellness facilities and schemes when really all passengers are looking to do is check-in, maybe grab a

coffee and a quick bite – if time permits – and get through security as swiftly as possible, before arriving in the departure lounge to await boarding. Spending half an hour to get a massage isn't likely to be on the itinerary.

What the results of our research do provoke is a debate around future trends in passenger behaviour at large and small airports. Are travellers more interested in generally experiencing more at busier airports – and accordingly having higher expectations for an 'airport experience' – than their counterparts at smaller airports,

“Most airports tended to sit in the middle of the category meaning they have some sort of wellbeing initiative in place.”

Airports with wellness facilities

MEDITATION ROOM OR PRAYER ROOM



MASSAGE CHAIRS



MASSAGES



SPAS



who are comparatively less interested in an 'airport experience' – and indeed wellness – and instead more interested in a speedy service?

The remaining three airports sitting at the top of category were Edinburgh, Glasgow and Newcastle. Elsewhere, most airports tended to sit in the middle meaning they have some sort of wellbeing initiative in place, which is, of course, an encouraging sign. This included small airports like Doncaster Sheffield, Exeter, Glasgow Prestwick and Jersey, as well as large airports like Leeds Bradford, Liverpool and London City. Most tend to have a quiet space for people to retreat to, except for London City. However, in its defence, the airport does offer passengers the ability to enjoy a pre-flight spa experience.

Tips for nervous flyers

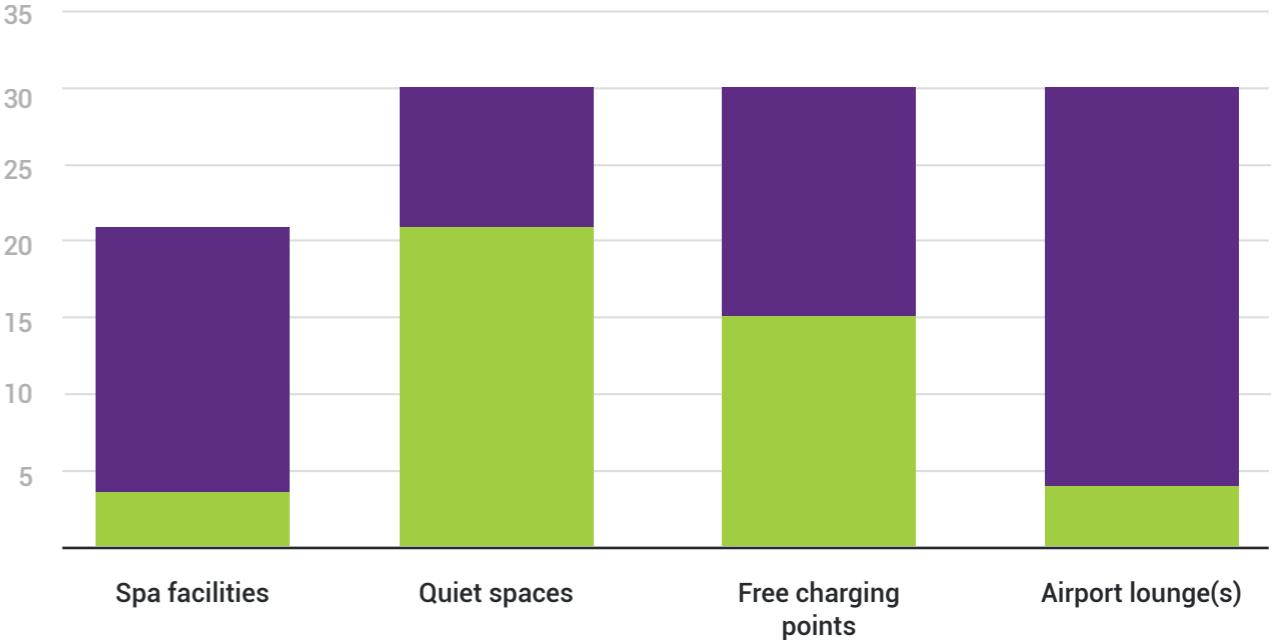
1	Be organised	5	Practise breathing exercises
2	Avoid alcohol	2	Drink chamomile tea
3	Speak to your cabin crew	3	Check the facts
4	Take your own headphones	4	Pack plenty of distractions

READ MORE <https://www.netflights.com/blog/tips-nervous-flyers/>

Facilities

Facility	Airports with	Airports without
Spa facilities	4	17
Quiet spaces	21	9
Free charging points	15	15
Airport lounge(s)	4	26

■ Airports with ■ Airports without



How 30 of the UK's airports fare with key facilities

Facilities, which factored in a wide range of practical and complementary amenities – including restaurants, shops and quiet spaces, as well as charging points and Wi-Fi – was an interesting category. Unexpectedly, it was topped by London Southend, which is one of the UK's quieter

airports. This ranking somewhat bucked the trend as we found that busier airports generally scored a lot stronger for facilities.

Again, we'd assume this to be the case. As well as dealing with a significant number of passengers, large airports also have to cater to a wider range of travellers – families, couples, business travellers, elderly travellers, travellers with mobility restrictions – who, in turn, have a greater variety of requirements.

If the airport you're travelling from doesn't have a spa or offer massage services, here are 10 top ways you can take the hassle out of air travel and create a more tranquil experience.

		
Take paper copies of your boarding pass	Allow yourself plenty of time	Fly in the morning
		
Remember your hand luggage essentials	Don't rush to board	Choose a 'wacky' suitcase
		
Wear layers	Eat and drink wisely	Always have travel insurance

READ MORE www.netflights.com/blog/10-tips-for-hassle-free-travel

For instance, consider passengers looking to fly from Newcastle, which scored very well for the category – it ended up in third place – and passengers looking to fly from Durham, which scored lower (out of a total of 30 it ended up, along with London City, joint 21st). Newcastle has over five million annual passengers and is used by both leisure and business travellers. Durham, in comparison, manages just over 140,000 passengers every year and is used mainly by business travellers. In short, the kinds of facilities on offer in each airport are relative to its size.

Returning then to London Southend – which was overall, along with Newquay, the highest scoring small airport – what sets it apart from other airports is the fact that it has a lot of welcome facilities in place. This includes a spa, a quiet room and a good number of restaurants, as well as free unlimited Wi-Fi and designated charging points in departures.

Other small airports that scored well for facilities include Doncaster and Exeter. Both ranked higher than large airports like East Midlands, Manchester, Edinburgh, Glasgow, London Luton and London Stansted.

In contrast to London Southend, Guernsey, which came bottom of the category – and was the lowest scoring airport overall – has no spa or massage facilities, no quiet space, and no designated charging points. If the airport were to make small changes here, such as investing in charging points and/or setting up a quiet room – it would find itself jumping up the scoreboard.

Elsewhere, Belfast International's low ranking – 28 out of 30 – raised a few eyebrows. It was, by far, the lowest scoring large airport for facilities. With no spa on offer, a moderate restaurant per passenger count, and up to just two hours of free Wi-Fi time – as well as no designated charging points in the departure lounge (only found in the restaurant Sip and Stone) – it was easy to see why Belfast International performed less well than other large airports. The remaining large airports – Bristol, Birmingham, London City and Liverpool – were bunched together in the middle at around the 50% mark.



Facilities at the airports

Large airport

Small airport

AIRPORT	SPA OR MASSAGE ACCESS	ACCESS TO A QUIET SPACE/ MEDITATION ROOM/PRAYER ROOM	NUMBER OF SHOPS	NUMBER OF RESTAURANTS	WI-FI	DEDICATED ELECTRONIC CHARGING POINTS	NUMBER OF PUBLIC LOUNGES	FACILITIES RANKING
London Southend	Spa	Yes	2	4	Unlimited free	Yes	1	1
London Heathrow	Massages	Yes	136	49	Unlimited free	Yes	7	2
Newcastle	Spa	Yes	10	8	Unlimited free	N/A	2	3
Doncaster Sheffield	No	Yes	1	3	Unlimited free	Yes	1	4
London Gatwick	Massages	Yes	48	28	Unlimited free	Yes	6	4
Exeter	No	Yes	1	3	Unlimited free	N/A	1	6
East Midlands	Massage chairs	Yes	8	9	Unlimited free	N/A	1	7
Manchester	Massage chairs	Yes	30	21	Free for 4 hours	Yes	2	8
Edinburgh	Massages	Yes	21	13	Free for 2 hours	Yes	2	9
Glasgow	Spa	Yes	16	11	Free for 1 hour	Yes	2	9
London Stansted	Massages	Yes	23	16	Free for 4 hours	Yes	1	9
Jersey	No	Yes	4	3	Unlimited free	Paid	1	12
Leeds Bradford	No	Yes	5	7	Unlimited free	N/A	3	13
Newquay	No	Yes	1	1	Unlimited free	No	1	13
Southampton	Massage chairs	No	3	3	Free for 4 hours	Yes	1	15
Bristol	No	Yes	11	11	Free for 2 hours	Yes	2	16
Belfast City	No	Yes	4	4	Unlimited free	N/A	1	17
Birmingham	Massage chairs	Yes	17	12	Free for 30 mins	Yes	4	17
London City	Spa	No	8	7	Unlimited free	N/A	1	17
Liverpool	No	Yes	11	10	Free for 30 mins	Yes	1	20
Durham	No	No	1	1	Free for 30 mins	Yes	1	21
London Luton	No	Yes	26	17	Free for 4 hours	Yes	1	21
Glasgow Prestwick	No	Yes	1	3	Free for 2 hours	N/A	0	23
Aberdeen	No	No	9	5	Unlimited free	Yes	1	24
Norwich	No	No	1	2	Unlimited free	No	1	24
Bournemouth	Massage chairs	No	1	3	Unlimited free	N/A	0	26
Cardiff	No	No	3	4	Free for 2 hours	Paid	1	27
Belfast International	No	Yes	6	10	Free for 2 hours	No	1	28
Isle of Man	No	No	2	3	Unlimited free	N/A	0	29
Guernsey	No	No	2	1	Unlimited free	No	0	30

Lounges

To assess an airport's lounge offering, we considered the number of lounges per passenger, the cost of accessing a lounge and the rating it received on TripAdvisor. Based on these factors, small airports did very well. Out of the top 10 highest scoring airports for the category, only one, Birmingham, was a large airport – and it also came in tenth place.

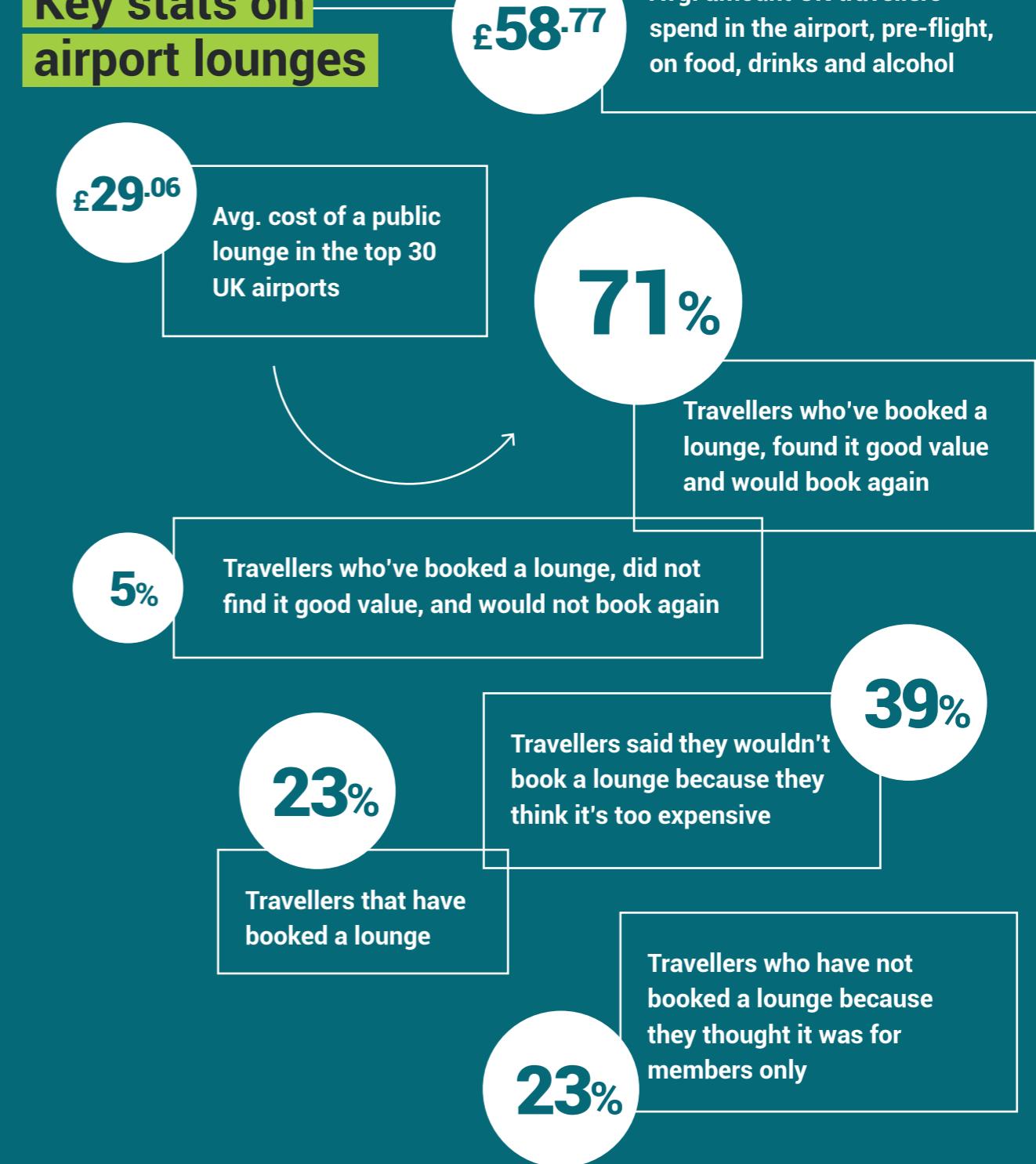
Interestingly, two of the smallest airports in the UK led the way with Newquay and Norwich sharing first place. It has to be said that both are exceptionally good value for money when it comes to lounges, with entry into the latter costing a reasonable £20 and the former a very affordable £15 (expectedly this was the cheapest lounge out of the lot).

When you think of how much money people can end up spending on pre-flight food and drink alone, which [our research suggests averages around £60](#), it's surprising more travellers don't actually take advantage of lounges.

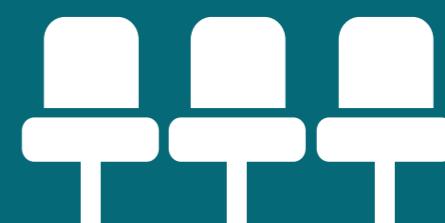
Top 10 airports for lounges

Rank	Airport	Type
1	Newquay	Small airport
2	Norwich	Large airport
3	Exeter	Large airport
4	London Southend	Large airport
5	Southampton	Large airport
6	Durham	Large airport
7	Doncaster Sheffield	Large airport
8	Jersey	Large airport
9	Cardiff	Large airport
10	Birmingham	Large airport

Key stats on airport lounges



" Small airports dominated the lounges category."



“

Price was an influential factor - the cheapest lounges generally scoring higher.

”

The following might be a contributing factor. The only snag with the above lounges, so to speak, is that they both do not permit entry to under 12s meaning they're effectively closed off to passengers travelling with young children. It's worth noting that both airports didn't score so highly in the family-friendly category, either.

That wasn't the only eye-opener. Lounges was one of the few categories that Durham did well in, with the airport scoring an impressive 80%. As a business traveller-focused airport, this makes a lot of sense – airport lounges tend to be popular with and geared towards this passenger subset. At only £21.95, it was comparatively cheap for an airport of this ilk too.

Needless to say, price was, indisputably, an influential factor affecting an airport's

ranking, with the cheapest lounges generally scoring higher. Likewise, while some of the pricier lounges scored well – for example, Jersey, Leeds Bradford and Liverpool – most gravitated towards the bottom of the table. This included Newcastle, Glasgow, London Gatwick and London Heathrow. In short, the more expensive the lounge, the lower the rank.

This was certainly and explicitly the case with London City, which has traditionally been a business traveller-focused airport. It was firmly rooted at the bottom of the category, along with smaller airports like Bournemouth, Glasgow Prestwick, Guernsey and the Isle of Man.

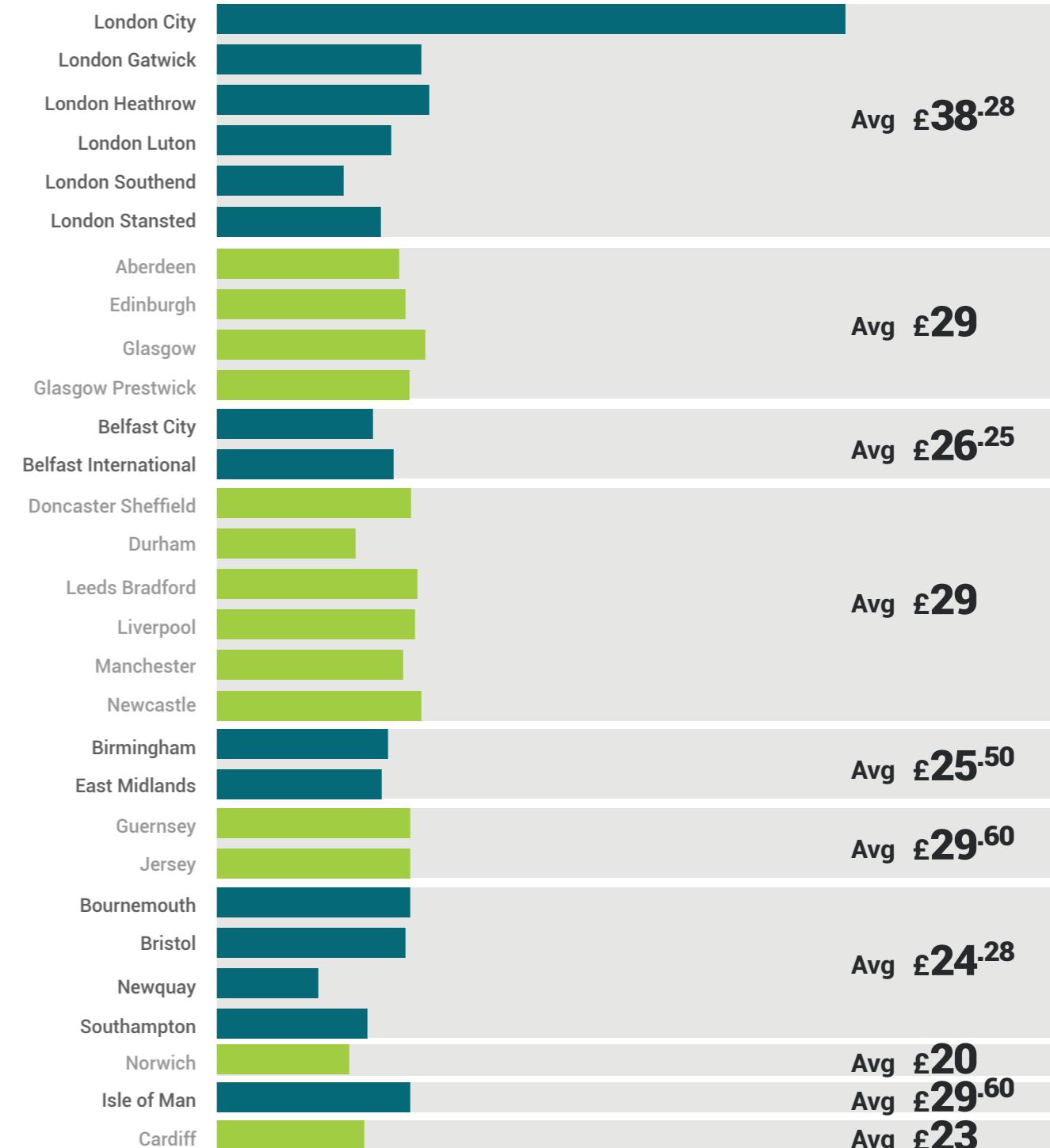
While these smaller airports were all docked points for having no lounges, London City was instead penalised for what is an



Average cost of lounges

£25

£35



extravagantly priced lounge. With prices starting from £95, it's miles apart from any other airport, big or small. That said, as a caveat of sorts, London City has described it as a "first class lounge" – and one that "sits in the heart of the private jet centre facility; home to the business and wealthy flyers".

This high entry point may change. As the airport noted in its Draft Master Plan 2020-2035, it wants to be more than just a business airport – and it's already well on its way to delivering on this ambition. For example, 2018 was a landmark year as it was the first time in its history that there was an equal split in business and leisure passengers.

Food

Food was another category that small airports excelled in. Not only did every single one score above 60%, small airports also occupied the top 11 spots in the category.

Again, Durham surprised, joining Newquay in first place. While there's limited choice in terms of where you can go for food and drink at the airport – both, for example, have the same eatery before and after security – it's still in proportion to the size of the airport and the number of passengers it manages on a daily basis. And again, are passengers flying from Durham in want of more choice in terms of eateries? Probably not.

In any case, the menus are varied enough to provide passengers with a multitude of options and the prices are more than

competitive. At Durham, for example, you can snap up a freshly baked pizza for less than £10 and a toasted panini for less than £4, while the most expensive pint at the airport will set you back no more than £4.50.

As for the other high scoring small airports, the average number of restaurants per airport was three, with annual passenger numbers ranging from just under 550,000 at the quieter end to just over 1,500,000 at the busier end. What we can infer from this is that when it comes to top scoring small airports, the number of restaurants that passengers can access is reasonably relative to the size of the airport. Those servicing more travellers, like Cardiff and London Southend, have more restaurants per passenger (four each), while Exeter and Glasgow Prestwick, which deal with smaller passenger numbers, have less restaurants per passenger (three each).

“Food was another category small airports excelled in – every single one scored above 60%.”

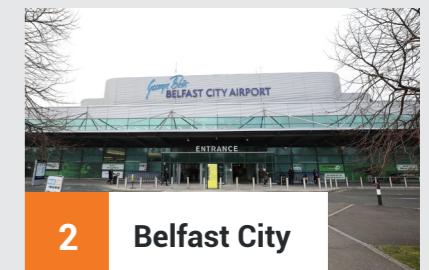
Consumer choice



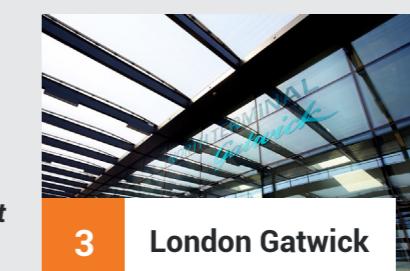
1 London Heathrow



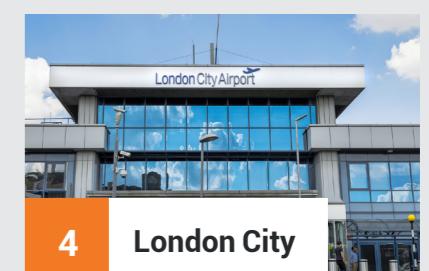
2 Belfast City



3 London Gatwick



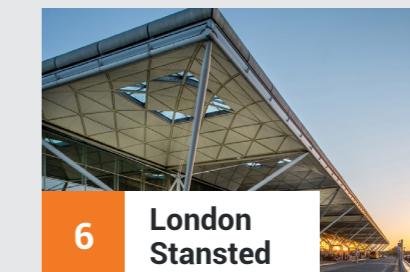
4 London City



5 Birmingham



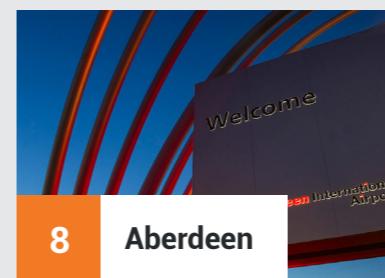
6 London Stansted



7 Belfast International



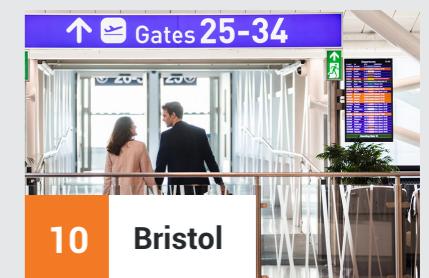
8 Aberdeen



9 Glasgow



10 Bristol



For busier airports, it was something of a mixed bag. While all airports scored above 50%, 10 out of the 11 lowest scoring airports for food were larger airports. This included three of the busiest airports in the UK: London Heathrow, London Gatwick and Manchester. When it came to the number of restaurants per passenger, these three airports – in fact, all low scoring airports – lost valuable points.

That said, this doesn't seem to have impacted so much on passenger opinion. We found, for example, that Heathrow and Gatwick achieved some of the highest scores for restaurant reviews – the former getting the highest score out of all airports in fact. Further, 48% of respondents to our consumer survey rated food options at the airport as good/excellent compared to 13% who rated it as terrible/bad. As for Gatwick, 44% rated food options as good/excellent, while 14% described it as terrible/bad.

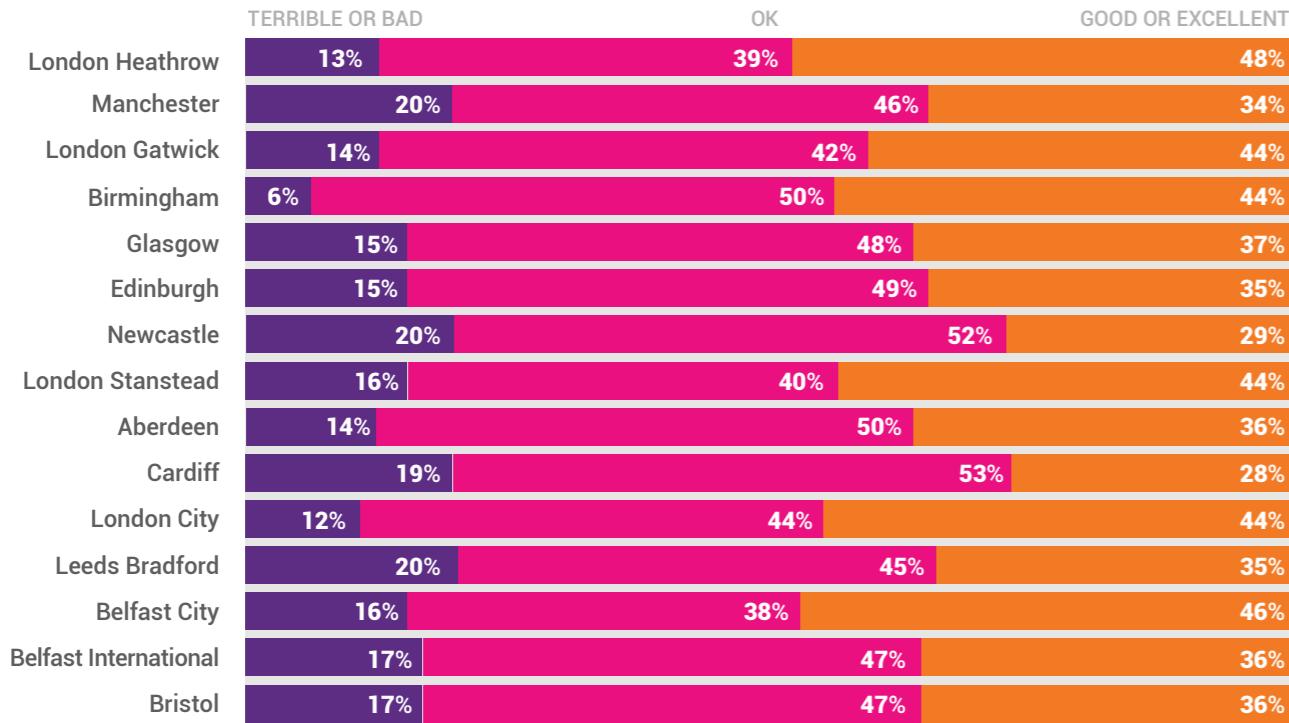
“ 10 out of the 11 lowest scoring airports for food were large airports.”

On that note, it's worth highlighting that most airports achieved an average/good rating when it came to customer reviews. So, while there's clearly room for improvement, as things stand, airports shouldn't be too worried – for now.

Elsewhere, East Midlands and Liverpool were among a select few big airports that scored very well for food – they achieved a category rating of 78% and 74% respectively. They were followed by

Belfast International, London City, Leeds Bradford and Newcastle. Increasing the number of restaurants in each of these airports would do wonders for their overall score in the food category.

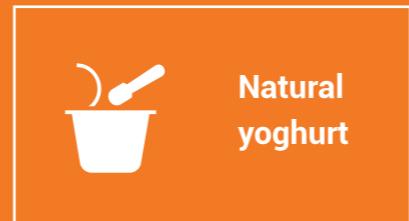
48% of consumers rated food options at Heathrow as good/excellent; 13% rated it as terrible/bad – can we please list the consumer survey ratings of all airports



Food and drink you should have before a flight



Lean proteins



Natural yoghurt



Foods rich in vitamin C



Herbal tea

Food and drink you should avoid before a flight



Fatty foods



High-fibre foods



Coffee



Alcohol

READ MORE www.netflights.com/blog/foods-you-shouldnt-eat-before-flying

Key findings

Larger airports generally outscore smaller airports

Our analysis found that the overwhelming majority of the UK's biggest airports achieved a high score overall, with most appearing in the top half of the scoreboard (12 out of 15). The UK's busiest airport, London Heathrow, took first place and was followed by London Gatwick, Birmingham, Edinburgh and Glasgow. Seven more airports followed, with London Southend and Newquay – two of the highest scoring smaller airports – joining Liverpool in joint 11th place. When it comes to performance, the message is clear – busier airports are more consistent in their performance.

Smaller airports shine at a category level

While the overall scores reflected the results on a per category basis, with busier airports generally outscoring smaller airports, the latter still had its moments. This was especially true of lounges and food. Here we found that small airports easily outscored large

airports – 10 of the busiest airports, for instance, found themselves rooted to the bottom of the category.

Likewise, the big/small divide wasn't as black and white as the results may suggest. Take for example the family-friendly category. Scores, from high to low, were more evenly distributed between larger and smaller airports. Similarly, when it came to the facilities category, while busier airports scored higher, it was actually topped by a small airport – London Southend.

Larger airports tend to be more multifaceted

Our analysis revealed that busier airports, by virtue of their size, offer a fuller, more rounded and all-encompassing pre-flight experience – which they will generally seem to deliver on. Whether it's from a practical and inclusive point of view – think accessibility schemes – or from a pure pleasure or health perspective – think shops and wellness initiatives – passengers can be fairly confident that most of their needs and wants will largely be met at a large airport.

Busier airports are more consistent in their performance

Larger airports still have a long way to go

Nevertheless, while most of the UK's busiest airports achieved high scores, our review demonstrates that there's still plenty of work to be done, whether it's in categories they generally scored well in, like accessibility, or ones they appeared to underperform in. Consider food. Large airports clearly need to invest in more restaurants and improve customer service. Likewise, they need to look harder at being more family-friendly – it seems extraordinary that seven large airports do not have a designated play area.

Furthermore, three of the UK's busiest airports, London City, Belfast International and Leeds Bradford, all achieved a rating of less than 60%. Not only were they noticeably adrift of their counterparts on the overall scoreboard, they were all also outscored by at least seven smaller airports (10 if you look at just Belfast International and Leeds Bradford).

Newquay and London Southend show that size isn't everything

That London Heathrow, which is the busiest airport in the UK and Europe – and seventh busiest globally – topped the overall scoreboard isn't that much of a surprise. Dealing with a considerable number of passengers on a daily basis requires major infrastructure, the kind not too dissimilar to that found in a town or city. What was instead more of a revelation was the high scores achieved by London Southend and Newquay, which both topped the small airports scoreboard.

While they weren't consistent across all categories – Newquay scoring well for lounges and food, less so for family-friendliness; London Southend ranking high for wellness, not so much for accessibility – their performance showed that even smaller airports can 'compete' with larger airports and have in place similar facilities and services. It's just to a different scale.



The UK's bigger airports will give you a better chance of a dependable pre-flight experience.



Performance of small airports is relative

So, what does all of this mean for the UK's smaller airports? Do they have their work cut out? Far from it. What we can gather from the results of our review is that the smaller airport experience, as with larger airports, is largely dictated by size and the kind of passengers they serve. This tends to mean their operations are a lot smaller and simpler which, firstly, isn't necessarily a negative and secondly, on the whole, is understood to be the case by passengers.

A family that turns up to Bournemouth is unlikely to feel disappointed by the fact that the airport, whose annual passenger numbers sit around the 670,000 mark, does not have a play area. Equally, a passenger flying from Guernsey isn't really going to be hankering for a lounge experience – so the fact that it doesn't have one, while London Heathrow has seven, shouldn't really see it lose points.

Comparing large and small airports has certain limitations

It's clear to us now that some of the criteria we've used to assess airports is more favourable and more relevant to larger airports. Consider wellness, one of the categories that smaller airports didn't score so well in. Airports like Norwich, Isle of Man and Durham picked up zero points here, which, on reflection, seems a little unfair. These airports are small, they have some of the lowest passenger numbers in the UK and, from an experience perspective, they're arguably set up to get people from the terminal to the departure lounge in a streamlined and efficient way, rather than encourage a longer pre-flight dwell time. Wellness, while important, is therefore more of a luxury – nice to have, but unessential.

Conclusion

If you've booked tickets to fly from one of the UK's bigger and better known airports, chances are your overall pre-flight experience is going to be fairly dependable one. Likewise, travel from one of the UK's smaller airports and you can be fairly confident about the kind of experience that lies ahead. That's because more often than not, our expectations of airports are based on familiarity and size. Every now and again, however, the experience can be unexpectedly disappointing or far better than anticipated. You can think of this report as a way of gauging how good or bad that is.

Our review is, in many ways, a reassuring one. While few if any of the airports scored consistently well across all our categories, what is clear is that UK airports, both

big and small, tend to deliver a reliable service. And, moreover, that they are also committed to making the pre-flight experience as easy-going and enjoyable as it can be, whether you're interested in having a long lunch or a quick bite, keen to keep the kids entertained or treat yourself, or need some form of special assistance or access to Wi-Fi.

And while you may be disappointed at times and find that responses to a particular need or want are less than adequate, you can be pretty confident that most airports are already thinking of ways to improve things. And, if that's not the case, hopefully after reading this review, they'll have a few more urgent action points to add the top of their very long list of things to do.

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