

International comparisons of UK border/immigration satisfaction

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Executive summary

- Border/immigration control has been identified as one of the biggest ‘pain points’ in an air passenger’s journey (IATA, 2017).
- Passenger perceptions and experience of border/migration control influence repeat visitation and reflect a nation’s status, priorities and international reputation.
- Images in the media showing lengthy and disorderly queues of frustrated passengers in UK airport arrival halls damage Britain’s reputation at home and abroad and are a leading source of passenger complaint.
- Although UK Border Force has service standard targets to process 95% of non-EEA passengers through immigration in 45 minutes and 95% of EEA passengers within 25 minutes, research by IATA (2017) suggests that the maximum acceptable waiting time for passengers is only 10 minutes, irrespective of their nationality or location.
- A systematic desktop comparison of international approaches to border/immigration control indicate that some countries, including Australia and the United States, have initiated border entry programmes that are dedicated to improving the passenger experience.
- Although some UK airports have invested in improving the passenger experience of border/immigration control, this has not occurred at every airport.
- The introduction of ‘fast track’ immigration and border control facilitation products at some airports risks creating a ‘two tier’ immigration system. The absence of hypothecation for this revenue creates little commercial incentive for airport operators and Border Force to improve services.
- There are significant opportunities for improving the passenger experience (and thus satisfaction) of UK border/immigration control through enhanced data sharing, greater investment and improved flexibility of staffing to respond to the arrival of both scheduled and particularly non-scheduled (i.e. disrupted/delayed) flights.
- The potential implications of future trading and geopolitical relationships post March 2019 for UK border/immigration control and satisfaction are significant.

1. Introduction and scope of the briefing note

A traveller’s experience of negotiating border/immigration control at airports is important and should not be underestimated. In an era in which most international tourists, business travellers and citizens returning from abroad arrive by air, the border/immigration control process acts not only as an entry point but also an introduction to a country which reflects that nation’s priorities regarding border control and passenger wellbeing. Research indicates that a secure, efficient and welcoming border entry experience may lead to increased and repeat visitation and capture economic gains. In contrast, a slow, frustrating, poorly organised, understaffed, inefficient, and /or unwelcoming one generates negative media stories, elicits scathing reviews on social media and damages the country’s reputation. Given numerous recent accounts of long delays, disorderly queues and passenger dissatisfaction with the UK border/immigration process, the purpose of this briefing note is to provide, through a systematic desktop review, an international comparison of border/immigration

satisfaction to identify the countries that perform well on the border control satisfaction metric and compare the UK's performance against these 'best in class'.

To provide a comprehensive overview of the contemporary situation, both in the UK and internationally, the briefing note is structured into five main sections. Following this short introduction, Section 2 introduces the concept of passenger satisfaction as it pertains to airport border/immigration control. This is followed, in Section 3, by a description of the current situation in the UK. Section 4 then documents the international situation before conclusions are presented in Section 5.

2. Passenger satisfaction of airport border/immigration control

Reconciling strong and growing consumer and business pressure for seamless expedited global travel, trade and tourism in the face of increasing air travel demand and myriad geopolitical and security threats is a challenge confronting Governments worldwide. Anecdotal evidence indicates growing resentment and frustration at lengthy and/or unwelcoming border control and processing activities which cause stress, delay and inconvenience to travellers. Thanks to air service liberalisation and increased competition, passengers are now presented with a choice of which airports (and even which countries) to travel through and their personal experience (whether real, perceived or anticipated) and satisfaction with border control is an important point of differentiation (Fodness and Murray, 2007) and one which can deliver competitive advantage for individual airports and, we argue, individual countries. Nevertheless, despite some examples of good practice, introduced later in this document, there is concern that the general global prioritisation of border/immigration controls and border security has been to the detriment of passenger service and the customer experience.

Unlike many of the bureaucratic processes associated with air travel that can now be conducted remotely through internet-enabled smartphones and apps, border/immigration control requires travellers to physically present themselves and their passports, other identity documents and visas (if required) at either a staffed immigration desk or an electronic immigration gate (e-gate). For many travellers, time is a scarce and precious commodity and one they do not want to waste standing in lengthy lines for immigration control. The potential for delays and frustration at border entry points are very evident and are compounded by the fact that the responsibility for service delivery often relies on multiple providers and is often not the direct responsibility of the airport operator (a fact we return to later). Indeed, unlike other aspects of service delivery (including baggage handling, ground support and, increasingly, security screening), border/immigration control remains the sole preserve of the State and is rarely franchised or put out to competitive tender for provision by a third party operator.

In 2017, IATA's Global Passenger Survey identified security screening and border control as the two biggest 'pain points' in an airline passenger's journey as they both oblige passengers to wait in line (often for some considerable time) to be processed. Significantly, IATA suggest the maximum queuing time that passengers find acceptable for immigration control is 10 minutes, considerably less time than the standard border control clearing targets set by some national Governments.

Border control clearing time is an important airport service quality metric and usually measures the time taken between an individual person joining a queue and them completing border processing activities. The length of queue a passenger faces will depend on a number of factors including the level of border control staffing, the physical size of service area, the nature of technology employed,

the number of staffed screening lanes, the passenger profile of inbound passengers, the number of inbound flights arriving at the time and the presence of new security interventions or immigration directives. Although processing times and procedures vary from country to country, control clearing times are important for all passengers irrespective of their nationality or location (Wyman 2012).

Although objective and tangible measures of service delivery (such as queue length and wait times) are an important metric, so too are subjective customer expectations and experiences of the border/immigration control process. Unsurprisingly, passengers perpetually express a preference for an intuitive, efficient, dignified, friendly and welcoming experience. If service delivery exceeds an individual's expectations, then the person is content; if the service merely meets them then they are satisfied but if it does not meet them, even by some small measure, then they will be dissatisfied. Within the last decade, passenger satisfaction with the immigration process has often been poor.

Some airports have responded to long queues at peak times by employing 'presenters' (either staff members or holograms) who identify empty immigration desks and facilitate processing by directing passengers to available officers or e-gates. There is a danger, however, that this strategy can backfire with anecdotal evidence of disgruntled passengers questioning why the presenter is not actually processing passengers behind a desk but merely pointing out something most of them can easily identify for themselves. For reasons of efficiency and cost reduction, the use of multilingual e-gates, or electronic immigration gates, that positively identify passengers by comparing biometric details stored in their passport with their unique facial dimensions, fingerprints and/or iris patterns, is becoming increasingly common (Yu and Huang 2014). Although these gates are designed to be intuitive and speed up passenger processing, they can be disabled by sunlight shining into the camera lens or onto faces and so still require the presence of human immigration officers to adjudicate over rejected cases (Vine 2014).

3. UK border/immigration control

In the UK, Border Force is responsible, on behalf of the Home Office, for passport/immigration checks at UK airports. Border Force has service standard targets to process 95% of non-EEA passport holders through immigration in 45 minutes and 95% of EEA passengers within 25 minutes but in many cases, these targets are being missed with Heathrow and Manchester airports, which handle a large number of non-EEA flights and non-EEA passport holders, reporting queues in the immigration hall that, on occasion, exceed 3 hours.

As Table 1 illustrates, multiple providers are involved in the inbound facilitation process for international arrivals into the UK and failure at any one of these service delivery points can potentially impact on queue length at immigration and passenger experience of border entry control. These service failures can range from the relatively minor, such as delayed arrival of air stairs for disembarkation, to a major service failure such as an IT malfunction or gross overcrowding in the immigration hall. In 2009, fewer than 60% of passengers were satisfied with immigration at Gatwick and fewer than 70% were satisfied at Heathrow and Stansted (CAA, 2009). Although these airports have taken steps to improve their performance, opportunities remain to enhance passenger satisfaction of the UK border as only 80% of respondents to the 2014 ONS Opinions and Lifestyle survey of adults over 16 years of age living in private households in Great Britain were 'very satisfied' or 'fairly satisfied' with airport border controls on arrival compared with 85% in 2010 (DfT, 2014). This survey, however, only captures the views of a sample of residents of Great Britain, many of

whom we assume hold EEA passports. A comparative survey of the experiences of non-EEA passengers would be instructive.

Table 1: Inbound facilitation process (international arrivals into UK)

Stage	Provider
Deplane	Airport operator/airline/third party ground handling agent
Shops	Retailers/airport operator
Lavatories	Airport operator/third party cleaning and maintenance contractors
Immigration	UK Border Force
Baggage Reclaim	Ground handling agent/airline/airport operator
Customs	HMRC
Entry to UK	Airport operator
Onward egress journey	Individual/car hire company/public transport provider

Traditionally, all international arrivals were processed according to the order in which they arrived and presented themselves at the border control post. However, over time, arriving passengers have increasingly begun to be stratified according to their economic ‘value’ to an airline or a country with high fare paying passengers or individuals identified as being economically important to a country being given preferential treatment and by-passing queues (Travis, 2012). As border control queue lengths have increased and passenger dissatisfaction grown, individual airports have looked to turn immigration from a cost item into a revenue stream by offering a range of ‘premium’ border ‘facilitation services’.

3.1 Premium facilitation services

Premium facilitation services (also known as ‘fast track’) are now an important component of many airline and airport business models. Dubai International Airport, for example, offers a range of passenger concierge services including fast-track immigration by three different branded providers while many airlines offer fast track border entry services for first and business class passengers. For example, British Airways daily all-business class A318 services from London City to New York JFK use the time taken by the westbound refuelling stop in Shannon, Republic of Ireland, to enable pre-clearance of US Customs and Immigration so that the 32 passengers can deplane at the domestic terminal in JFK and thus bypass potentially lengthy queues at the US border (BA, 2018).

In recognition that time is a precious commodity for most passengers and that travellers value reliability, some UK airports are turning border entry control into a revenue stream by offering, for a fee, ‘fast track’ immigration products which enable additional fee-paying travellers to bypass immigration queues and potentially expedite their entry into the UK. Although concern has been expressed that this creates a ‘two tier’ immigration system based on ability and willingness to pay (see, for example, Travis 2012), such products offer airports lucrative additional sources of revenue.

London Gatwick, for example, offers, for a £7 fee, access to an exclusive ‘clearly branded’ immigration lane for which only 50 passes are sold per terminal per hour. The exclusive lane is open 06:00-24:00hrs local time every day except Christmas Day, Boxing Day and New Year’s Day. This service offers a maximum potential revenue of £2,280,000 per terminal per year (or £4,561,000 a year for the airport as a whole). Stansted also charge £7 and their dedicated lane is open 7am-2am

local time. Birmingham airport also sells 50 passes per hour for £5. Manchester airport charges £5 for the fast track service as does Edinburgh. From the limited information that is available to us, we understand that while a proportion of this additional revenue is given to Border Force for providing the service, the rest is retained by the airport operator. We have not been able to ascertain whether any or all of this additional revenue is hypothecated to fund improvements in the physical environment in which immigration controls are conducted, the immigration ‘servicescape’ (see Bitner, 1992), and suggest this would be an area worthy of further investigation.

4. International comparisons of border/immigration control

Every year since 1999 global air travellers have voted in the Skytrax World Airport Awards, the world’s largest annual airport customer satisfaction survey. The latest awards were based on the responses of 13.73 million survey questionnaires that were completed by over 100 different nationalities of traveller. The survey, which was available in English, Spanish and Chinese, was open between August 2017 and February 2018. It covered 550 airports worldwide and assessed customer satisfaction with 39 different airport services and performance indicators including surface access, terminal design, washroom facilities, wayfinding, check-in, transfer, retail, security screening and immigration (worldairportawards.com, 2018). The top 10 airports in 2017 are shown in Table 1.

Table 1: World’s top 10 airports in 2017

Rank	Airport	Country	Pax handled, millions (2017)
1	Changi	Singapore	62.2
2	Incheon	South Korea	62.0
3	Tokyo Haneda	Japan	85.4
4	Hong Kong	China	72.9
5	Doha Hamad	Qatar	37.3 (2016 figures)
6	Munich	Germany	44.6
7	Centrair Nagoya	Japan	11.5
8	London Heathrow	UK	78.0
9	Zurich	Switzerland	29.4
10	Frankfurt Main	Germany	64.5

Source: worldairportawards.com (2018), passenger numbers derived from individual airport’s corporate webpages.

As well as an overall winner, individual category awards are also produced. The top 10 airports for immigration satisfaction are displayed in Table 2.

Table 2: Skytrax – Best Airport Immigration 2017

Rank	Airport	Country	Pax handled, millions (2017)
1	Taiwan Taoyuan	Taiwan	44.8
2	Centraair Nagoya	Japan	11.5
3	Hong Kong	China	72.9
4	Copenhagen	Denmark	29.2
5	Helsinki	Finland	18.9
6	Tokyo Haneda	Japan	85.4

7	Zurich	Switzerland	29.4
8	Singapore Changi	Singapore	62.2
9	Seoul Incheon	South Korea	62.0
10	Tokyo Narita	Japan	40.7

Source: rankings from worldairportawards.com (2018), passenger numbers derived from individual airport's corporate webpages.

Japanese airports scored particularly highly for immigration satisfaction with 3 of their airports appearing in the top 10. The qualitative comments posted by travellers on the skytrax website (airlinequality.com) indicate why these airports scored so highly, with reviewers praising the speed and efficiency of the process and the friendliness of the immigration/border control staff they encountered.

A recent review of Taipei airport, for example, similarly reported that *'The security and immigration control agents are extremely friendly and the lines move pretty quickly'* (G Baker USA, 4/5/18). This favourable comment contrasts starkly with recent descriptions of negotiating passport control at Manchester airport: *'Passport control on return to UK in T1 is designed to give you a taste of post-Brexit hell'* (D Gartside, UK, 2/7/18) while passport control at Terminal 3 was branded *'a shambolic mess... severely overcrowded and cattle going to an abattoir would be better treated'* (R Carlson, UK, 26/6/18).

Perhaps tellingly, the only categories in which a UK airport featured in the top 10 were the 'Best Airport Shopping' category and 'Best Airport Dining' experience where London Heathrow (78m passengers in 2017) was ranked best and 9th best in the world. Significantly perhaps, no UK airport featured in the top 10 of conventional aeronautical (as opposed to non-aeronautical or commercial) performance metrics on baggage waiting times, friendliness of staff, cleanliness, ease of transit or immigration. It may instructive to research if there is any relationship between the model of airport ownership (public, private or part private) and passenger satisfaction with aeronautical (as opposed to commercial) services at the facility.

In recognition of the importance of border/immigration control, several countries have recently introduced dedicated programmes with the aim of improving passenger experience of border entry and capturing economic gains. The following sections briefly review the scope and objectives of these initiatives.

4.1 United States

US border control seeks to be welcoming, professional, helpful, efficient and communicative. Airports are advised that immigration areas should be well laid out and easy to navigate with clear flows and signs. The process time needs to be short, well managed and efficient.

The US Customs and Border Protection (CBP) Model Ports Program began in 2006 and sought to enhance border security while streamlining security/immigration processes and facilitating legitimate travel. It wanted to promote a 'warmer welcome' to the US and make immigration checks and border protection more intuitive (CBP, 2012). In 2015 the US Department of Commerce and Homeland Security developed a national goal to 'provide best-in-class international arrivals experience as compared to our global competitors to an ever-increasing number of international visitors, while maintaining the highest standards of national security' (US DCHS, 2015).

4.2 Australia

In 2016, in recognition of the importance of the traveller experience at the border to an island nation for which most inbound tourists, business travellers and returning residents arrive by air, TTF Australia produced a set of guidance notes on how to improve the border entry experience at Australian airports and, in so doing, capture increased market share of travellers and stimulate increased (and repeat) visitation (TTF, 2016).

4.3 Japan

As previously mentioned, Japanese airports score highly for immigration satisfaction. Like Australia, the Japanese Government has made a conscious effort to 'promote a tourism oriented country' through the expansion of a trusted traveller programme, the increased use of automated gates and measures to reduce wait time for examination. As part of this programme, the Immigration Bureau of the Ministry of Justice doubled the number of immigration examination desks at some airports by reconfiguring the space so that immigration inspectors are located at the front and the back of a booth to enable simultaneous inspections. Potentially problematic cases are flagged in advance as airlines must provide passenger name records electronically before an aircraft arrives on Japanese soil (Bureau of Immigration, 2016).

In all three examples, central Government has taken ownership of the challenge and introduced programmes to enhance the border entry experience for passengers. The interventions are not in themselves ground-breaking – they variously involve the better flow of information between airlines, airports and border/security agencies to flag peaks in demand so they can appropriately staffed, the provision of new technologies, including e-gates, more trained (ideally dual or multilingual) staff, employee training in 'soft' customer service skills (which, significantly, does not come at the expense of rigorous and targeted immigration control) and improvements in the physical 'servicescape' such as clearer signs, greater use of calming natural light and space and more initiative wayfinding – but collectively they seek to present a more welcoming face to inbound travellers and returning citizens alike while providing reassurance that rigorous border controls are applied but that legitimate travel is facilitated and, indeed, positively encouraged.

5 Conclusion

Airport service quality drives passenger satisfaction but often the focus has been on the outbound journey (Bogicevic *et al*, 2013) and improving the passenger experiences of security screening (Sakano *et al*, 2016). There is now growing recognition of the importance of the passenger experience of border entry control and immigration. A number of countries including the United States, Australia and Japan have introduced initiatives dedicated to improving the border entry experience of air passengers arriving in their territory in recognition of the fact that an efficient and welcoming border control experience can lead to increased and repeat visitation. Although UK Border Force has a standard service targets for processing EEA and non-EEA passport holders, the targets exceed the times given by IATA as being the maximum queuing time that is acceptable to passengers and there is evidence that these targets are being routinely missed. It is imperative that the UK performs better on this metric to successfully compete in the global marketplace.

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