J.D. POWER

2019 North America Airport Satisfaction Study (NAASS)ᴿᴹ

Methodology

Global Travel and Hospitality Practice

September 2019

The *J.D. Power 2019 North America Airport Satisfaction (NAASS) Study*^{SM} is a syndicated benchmarking study profiling the experiences of customers from Airports in North America. This research details the importance and impact of the overall customer experience on satisfaction.

To measure customer satisfaction, critical-to-customer experience factors are examined using an index model. The model identifies the dominant factors that impact customer satisfaction and behavior for the industry and provides a benchmark of excellence for each. The study measures overall customer satisfaction based on performance in six factors (in alphabetical order): Airport Accessibility; Baggage Claim; Check-in/Baggage Check; Food, Beverage, and Retail; Security Check; and Terminal Facilities.

The objectives of this study are to:
- Benchmark mega, large, and medium size North America airports on overall experience, as well as the components of that experience that include the surrounding infrastructure that enables travel to and from the airport
- Identify specific opportunities for improving the airport experience
- Identify insights on trends in consumer behaviors and expectations

Research Methodology

The *2019 North America Airport Satisfaction (NAASS) Study* utilizes a segmented methodology. A segmented methodology helps to address airport's needs for market-specific insights with an enhanced sampling structure to provide benchmarks in three key segments. The three segments are (in alphabetical order):

- Large
- Medium
- Mega

Data was collected using an online methodology via multiple consumer panel sources. The 2019 study collected a total of 32,276 completed surveys.

Fielding Periods:

- Wave 1: October 2018
- Wave 2: November 2018 to January 2019
- Wave 3: February to April 2019
- Wave 4: May to July 2019

An initial screening was conducted to ensure that respondents met the following criteria:

- 18 years of age or older

- Resident of the United States or Canada

- Traveled through at least one domestic airport, with both departure and arrival experiences (including connecting airports) in the past 30 days

- Had an originating airport within the United States or Canada

Qualifying respondents were asked to identify airports they traveled through during the past 30 days and must have traveled through at least one qualifying mega, large or medium airport to participate. Using least bucket fill methodology, 1 airport was identified for evaluation. Respondents with a qualifying connecting airport may have provided a second evaluation.

The survey was redesigned in 2019, therefore the data should not be trended to previous years.

Study Completes – Large Airports

Large Airports	2019 Study Completes
Austin-Bergstrom International Airport	396
Baltimore-Washington International Thurgood Marshall Airport	421
Calgary International Airport	411
Chicago Midway International Airport	426
Dallas Love Field	344
Fort Lauderdale-Hollywood International Airport	424
Honolulu International Airport	333
John Wayne Airport, Orange County	325
Kansas City International Airport	371
LaGuardia Airport	417
Louis Armstrong New Orleans International Airport	423
Montréal-Pierre Elliott Trudeau International Airport	403
Nashville International Airport	414
Oakland International Airport	304
Philadelphia International Airport	420
Portland International Airport	411
Raleigh-Durham International Airport	399
Ronald Reagan Washington National Airport	416
Sacramento International Airport	369
Salt Lake City International Airport	387
San Diego International Airport	421
San Jose International Airport	348
St. Louis Lambert International Airport	392
Tampa International Airport	431
Vancouver International Airport	414
Washington Dulles International Airport	395
William P. Hobby Airport	317
Total	**10,532**

Study Completes – Medium Airports

Medium Airports	2019 Study Completes
Albuquerque International Sunport	201
Bradley International Airport	306
Buffalo Niagara International Airport	297
Cincinnati/Northern Kentucky International Airport	311
Cleveland Hopkins International Airport	314
Edmonton International Airport	307
General Mitchell International Airport	268
Indianapolis International Airport	319
Jacksonville International Airport	291
John Glenn Columbus International Airport	296
Kahului Airport	149
Ottawa/Macdonald-Cartier International Airport	276
Palm Beach International Airport	298
Pittsburgh International Airport	336
San Antonio International Airport	273
Southwest Florida International Airport	316
Ted Stevens Anchorage International Airport*	84
Total	**4,642**

Note: *Small sample size (n=30-99)

Study Completes – Mega Airports

Mega Airports	2019 Study Completes
Charlotte Douglas International Airport	987
Dallas/Fort Worth International Airport	1201
Denver International Airport	1077
Detroit Metropolitan Wayne County Airport	794
George Bush Intercontinental Airport	759
Hartsfield-Jackson Atlanta International Airport	1802
John F. Kennedy International Airport	843
Logan International Airport	662
Los Angeles International Airport	886
McCarran International Airport	787
Miami International Airport	651
Minneapolis-Saint Paul International Airport/Wold-Chamberlain	779
Newark Liberty International Airport	708
O'Hare International Airport	1286
Orlando International Airport	674
Phoenix Sky Harbor International Airport	794
San Francisco International Airport	748
Seattle-Tacoma International Airport	800
Toronto Pearson International Airport	864
Total	**17,102**

Market Share and Weighting Scheme

- To provide a more accurate portrayal of the airport industry, responses were weighted by each airport's market share based on total number of passengers in 2018.

- Market share data is based on findings issued by Annual World Traffic Report 2018.
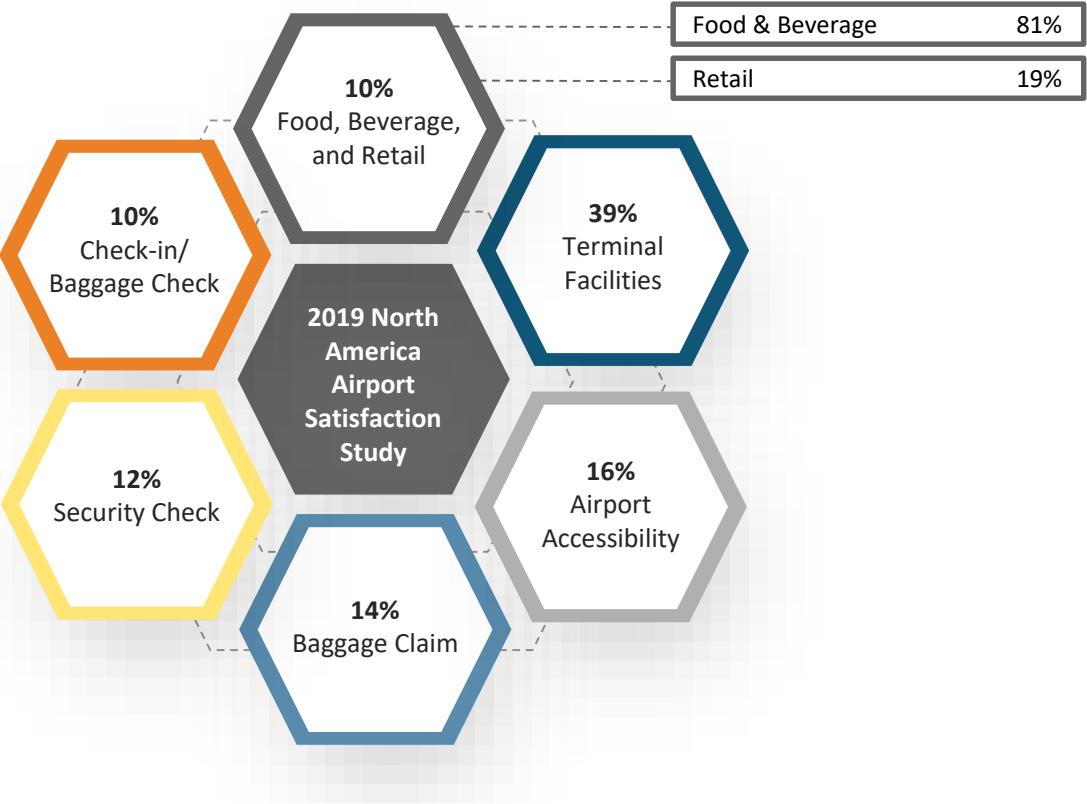
Award Criteria

- Airports receiving 100 or more completed surveys are eligible to be included in the rankings for the 2019 study award.

- The airport with the highest overall index score within a single segment and at least 100 completed surveys in their segment receives the award for that segment.

Index Model

- For more information about J.D. Power's index and benchmarks, please visit jdpower.com/about-us/about-our-industry-benchmarks.

North America Airport Satisfaction Study Index Model

Food & Beverage	81%
Retail	19%

10% Food, Beverage, and Retail

10% Check-in/ Baggage Check

39% Terminal Facilities

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12% Security Check

16% Airport Accessibility

14% Baggage Claim

Note: Values may not add up to 100% due to rounding

North America Airport Satisfaction Study Index Model

Index Model Composition Overall	Total Industry Index Model
Sample Size	**32,276**
R²	**0.78**
Terminal Facilities	**39%**
Ease of getting to your gate	16%
Availability of activity/entertainment options in the airport	15%
Cleanliness of terminal restrooms	15%
Clarity of signs/directions inside the terminal	13%
Comfort in the terminal	13%
Atmosphere/ambiance of the terminal	11%
Cleanliness of terminal concourses and hallways	11%
Wi-fi service	5%
Airport Accessibility	**16%**
Attractiveness of airport grounds	20%
Clarity of signs/directions	20%
Ease of arriving at the terminal	20%
Ease of leaving terminal	20%
Traffic flow on airport grounds	20%

Note: Values may not total 100% due to rounding; Table reflects effective impact of
primary factors on overall experience for total industry

North America Airport Satisfaction Study Index Model (continued)

Index Model Composition Overall	Total Industry Index Model
Baggage Claim	**14%**
Speed of baggage delivery	43%
Ease of finding your baggage claim area/carousel	29%
Physical condition/cleanliness of baggage claim area	28%
Security Check	**12%**
Amount of time required for security check	37%
Professionalism of security staff	33%
Ability of security process to make you feel safe	30%
Check-in/ Baggage Check	**10%**
Traffic flow at check-in/baggage check area	37%
Ease of finding check-in/baggage check location	33%
Cleanliness of the check-in/baggage check area	30%

Note: Values may not total 100% due to rounding; Table reflects effective impact of
primary factors on overall experience for total industry

North America Airport Satisfaction Study Index Model (continued)

Index Model Composition Overall	Total Industry Index Model
Food, Beverage, and Retail	**10%**
Food & Beverage	**81%**
Reasonableness of the price	22%
Quality of food and beverage	20%
Variety of food and beverage	20%
Availability of nearby seating	19%
Speed of service	19%
Retail	**19%**
Professionalism of staff	27%
Reasonableness of the price	27%
Variety of shops	25%
Quality of merchandise/services	22%

Note: Values may not total 100% due to rounding; Table reflects effective impact of
primary factors on overall experience for total industry