



J.D. POWER

2019 Airport Satisfaction StudySM



Michael Taylor
Practice Lead

October

Key Insights

*What JFK needs to know
about the 2019 Airport
Satisfaction Study...*

JFK ranks 12th in the Mega Airport segment

Now above the Mega category average and up two rank positions from 14th in 2018

Increased satisfaction with Terminal Facilities is driving JFK's improvement, especially availability of activity/entertainment

However, JFK as a whole is considered more “crowded” than the average Mega airport

Access is JFK's greatest opportunity compared to other Mega airports

Food, Beverage and Retail remains an opportunity for most airports, JFK is no exception, especially local food and beverage options

Methodology

The 2019 J.D. Power North America Airport Satisfaction Study...

Quick Facts:

Online Survey

All respondents screened for:

- 18 years of age or older
- U.S. or Canadian resident
- At least one round-trip airline flight within North America originating or departing from a qualifying airport in the past 30 days

Trending values for JFK compared to 2018 were provided

Three Segments Based on Annual Passenger Volume



Mega

33 MM+



Large

10 MM – 32.9 MM



Medium

4.5 MM – 9.9 MM



Fielded Continuously: October 2018-July 2019

Released Quarterly: December, March, June, October



Minimum 100 completes for rank eligibility

*small sample (30<n<99)

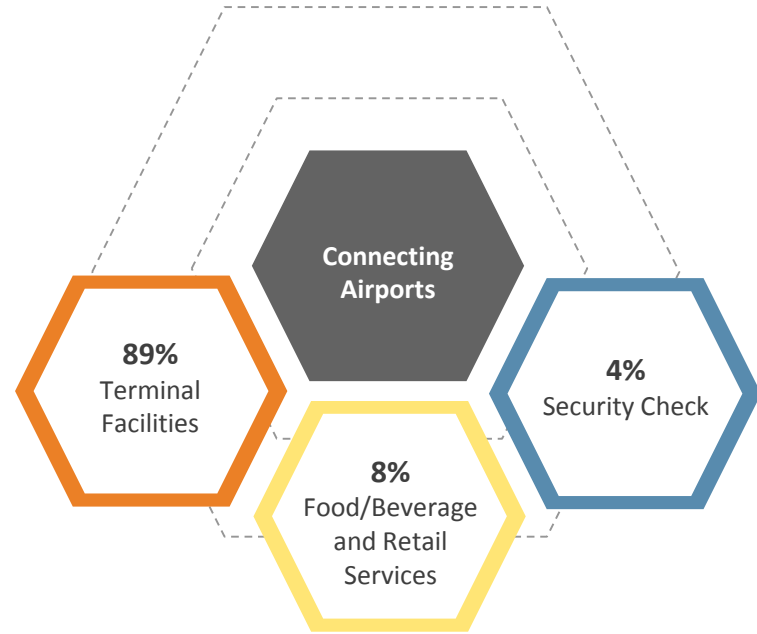
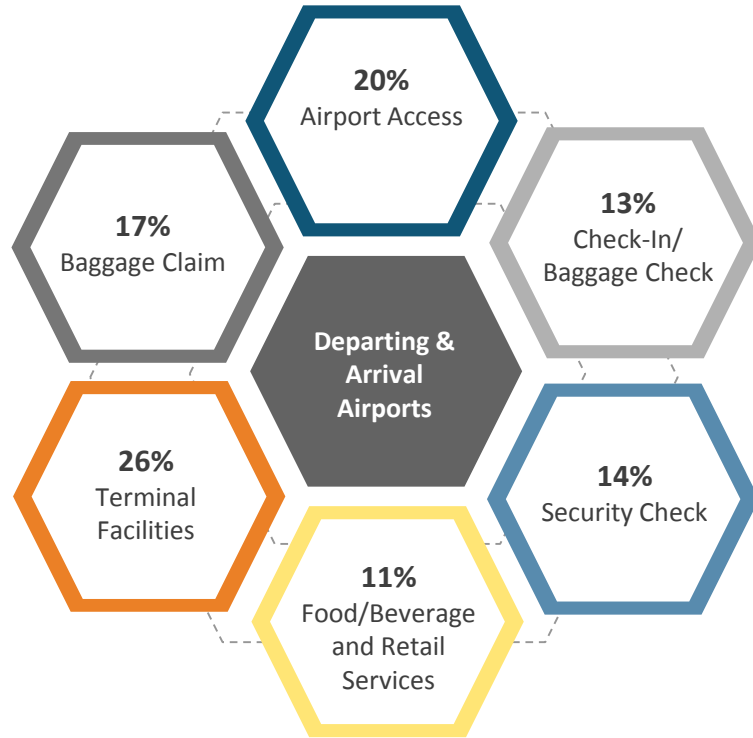
#insufficient sample (n<30)



Survey Methodology - Factor Weights

The North America Airport Satisfaction Index model has been updated for 2019

Connecting airport data is only collected for Mega airports



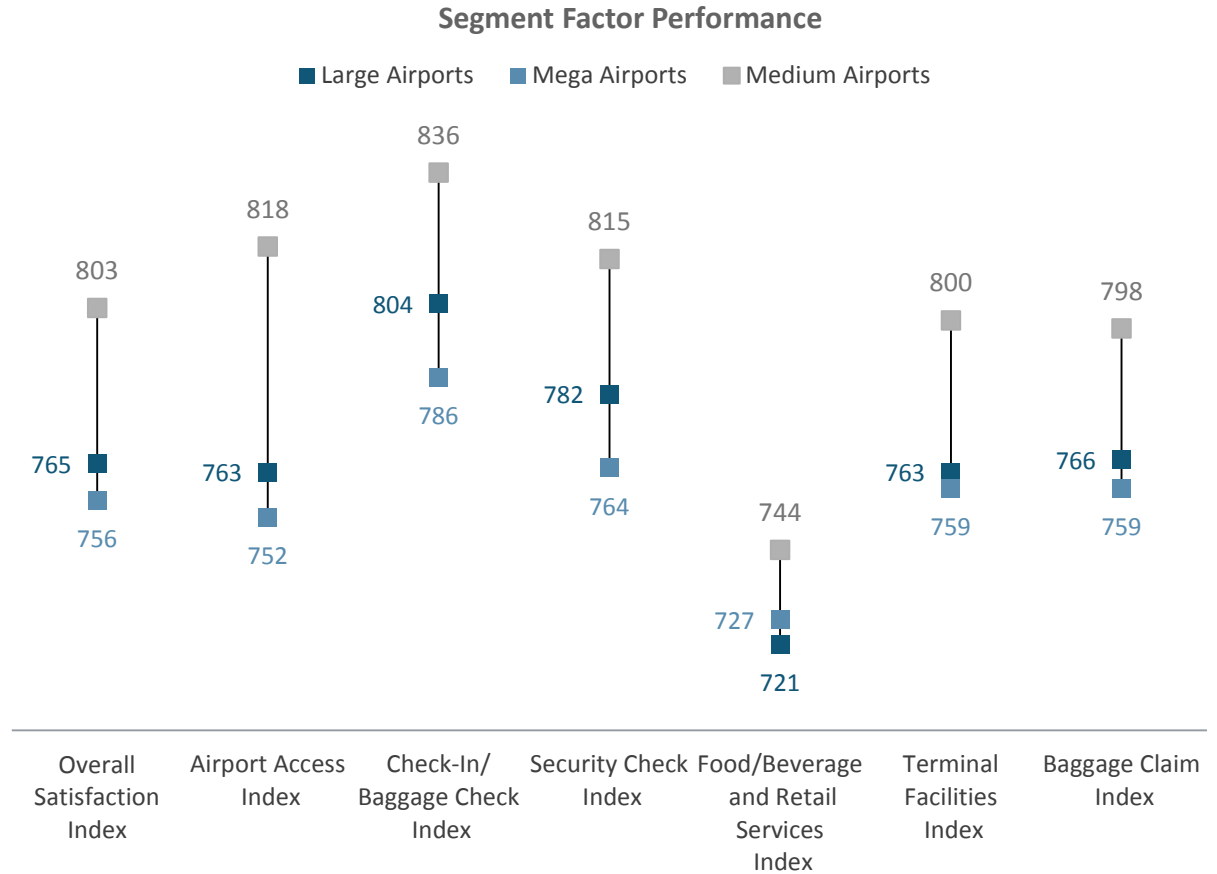
Percentages may not equal 100% due to rounding.



Overall Performance

Segment Factor Performance

Mega airports perform lower than Large and airports in all factors except Food/Beverage and Retail Services where Large airports have a slight advantage



Overall Satisfaction

JFK ranks 12th in Overall Satisfaction, finishing above the Mega airport average

JFK ranked 14th in the Mega Airport segment in 2018

Passengers say:

"Many flights at JFK"

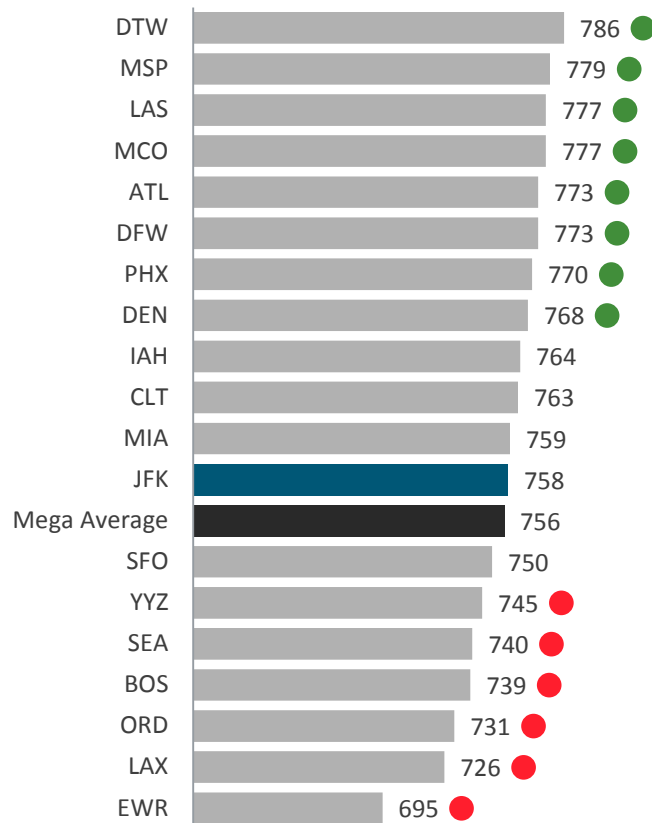
"airport is very crowded and stressful"

"JFK is really hard to get to from anywhere in New York."

●/● Significant difference at a 90% confidence interval; *Small sample size (n=30-99).

J.D. POWER

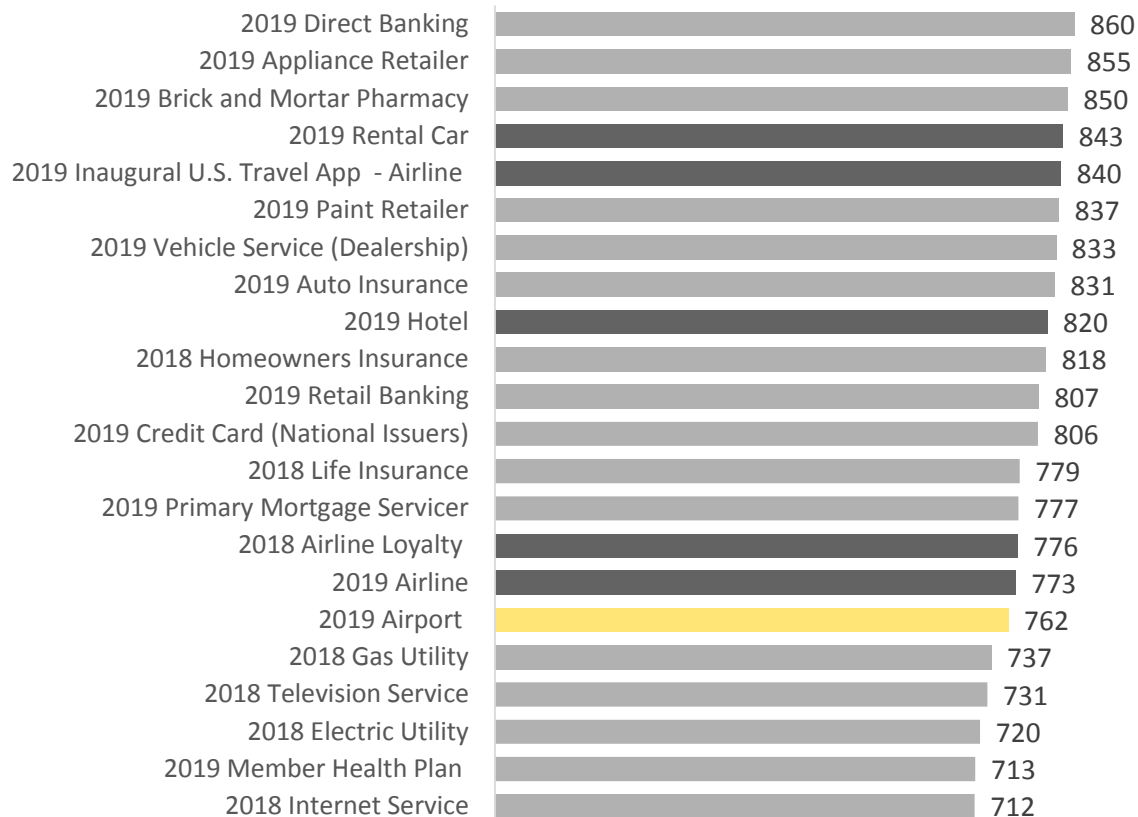
Overall Satisfaction Index: Mega Airports



How Do Airports Stack Up?

Airport satisfaction is on par with Airline satisfaction

Cross Industry Rankings (Service Industries)



Factor Performance

JFK receives higher scores than the average Mega airport in Food/Beverage and Retail Services as well as Terminal Facilities

JFK's biggest gap (64 points) to DTW is in Airport Access. DTW's Access scores were helped in 2018 by the completion of DOT work on Highway 94, the main access path to DTW.

Factor Performance

	JFK	Mega Airports	DTW
Overall Satisfaction Index	758	756	786
Airport Access Index	729	752	793
Check-In/Baggage Check Index	768	786	813
Security Check Index	753	764	801
Food/Beverage and Retail Services Index	734	727	748
Terminal Facilities Index	765	759	789
Baggage Claim Index	752	759	776

*Small sample size (n=30-99); #Insufficient sample size (n<30).

SWOOP Brand vs. Segment

Compared to the Mega airport average JFK's strength is in Terminal Facilities

JFK's biggest opportunity compared to the Mega average is in Airport Access.

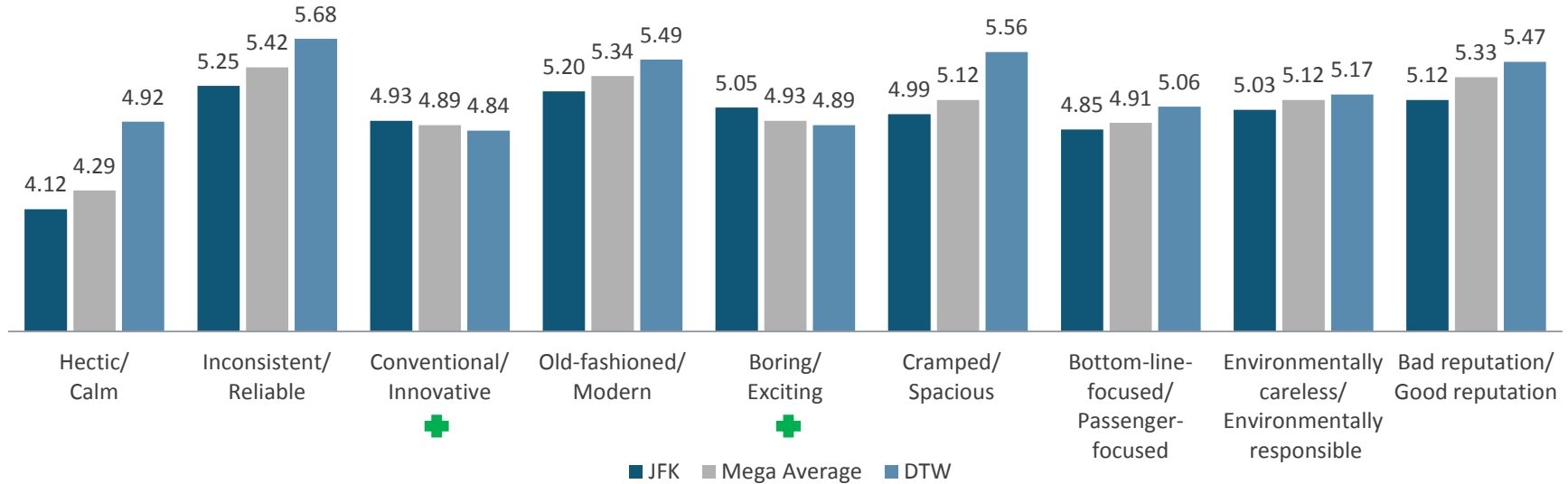
Weighted Gaps – Client vs. Segment Airport Average



Brand Image

JFK is seen as more exciting and innovative than the average Mega airport and DTW.

Brand Image Performance



*Small sample size (n=30-99); #Insufficient sample size (n<30).

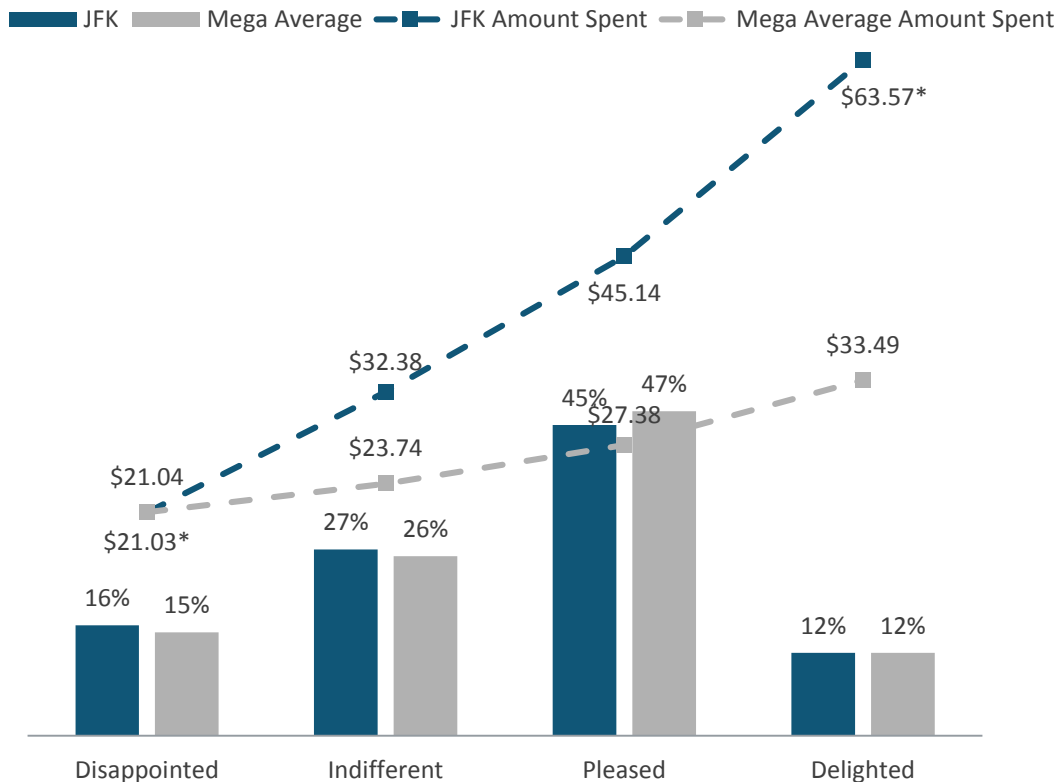
The ROI of Satisfaction

Delighted passengers spend more

JFK passengers on average spend \$40 in the terminal with Mega airports averaging \$26 in terminal spend.

*Small sample size (n=30-99); #Insufficient sample size (n<30).

Overall Satisfaction and In Terminal Spending

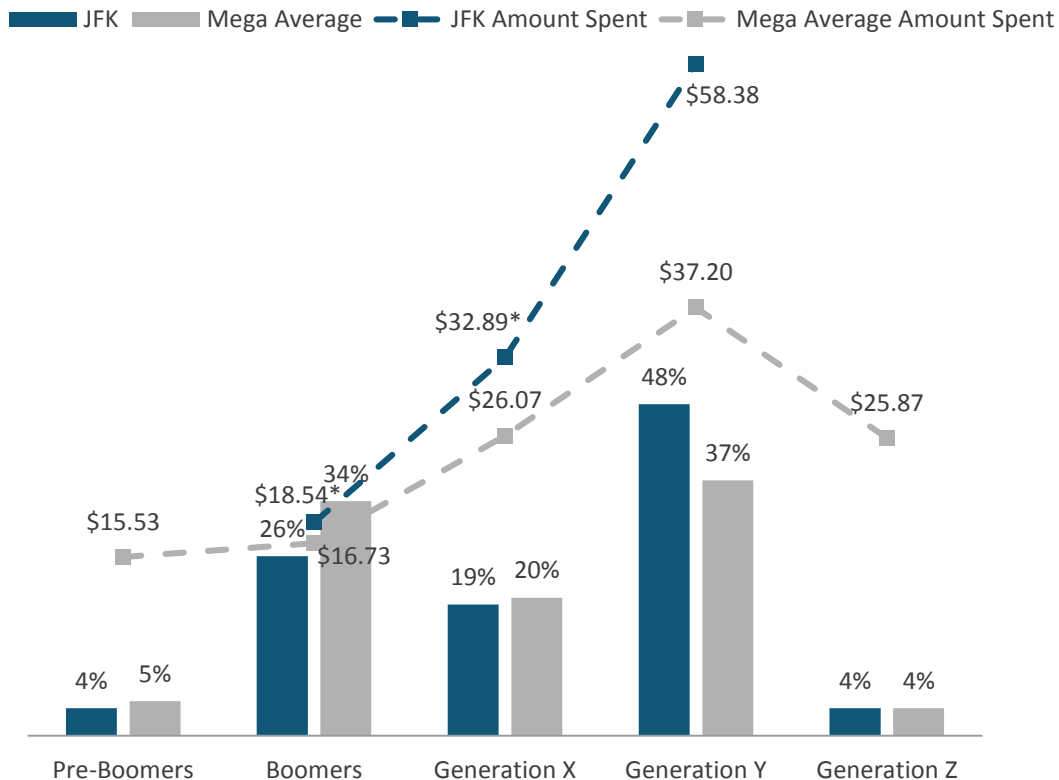


The ROI of Satisfaction

Younger generations tend to spend more at airports than older generations

JFK has fewer Boomer passengers and more Generation Y passengers than the average Mega airport.

Generation and In Terminal Spending

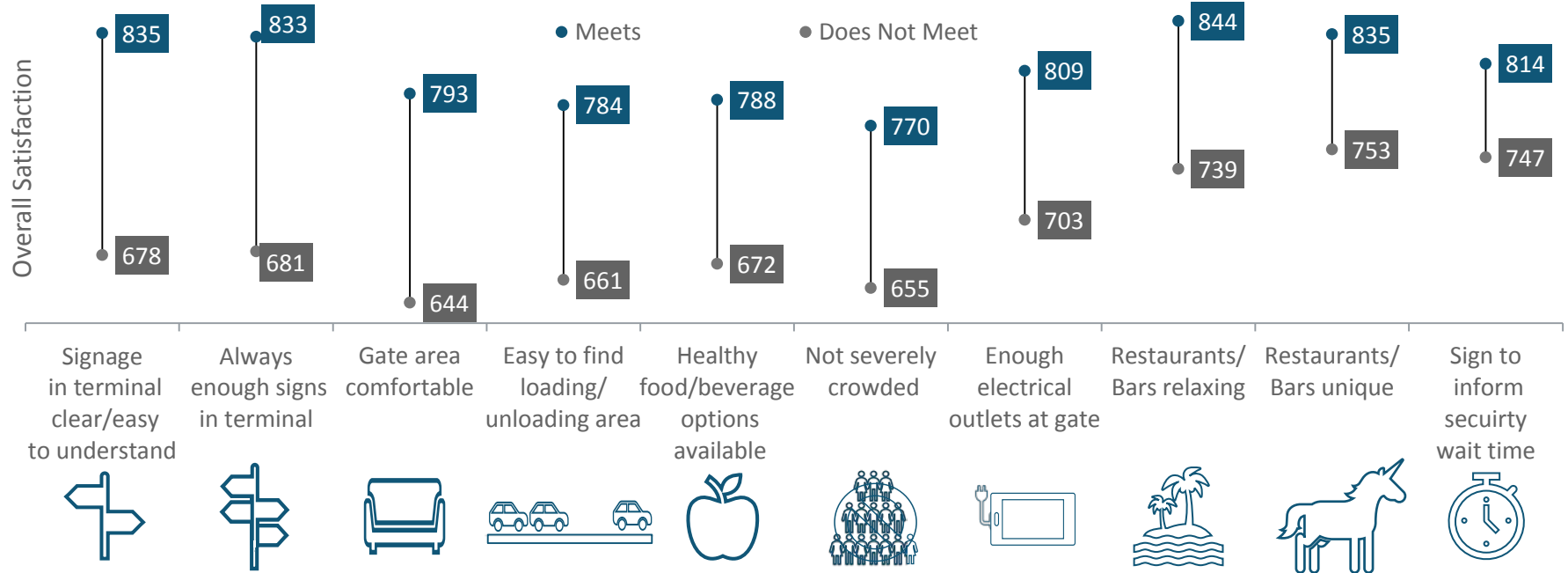


*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30)

Key Performance Indicators

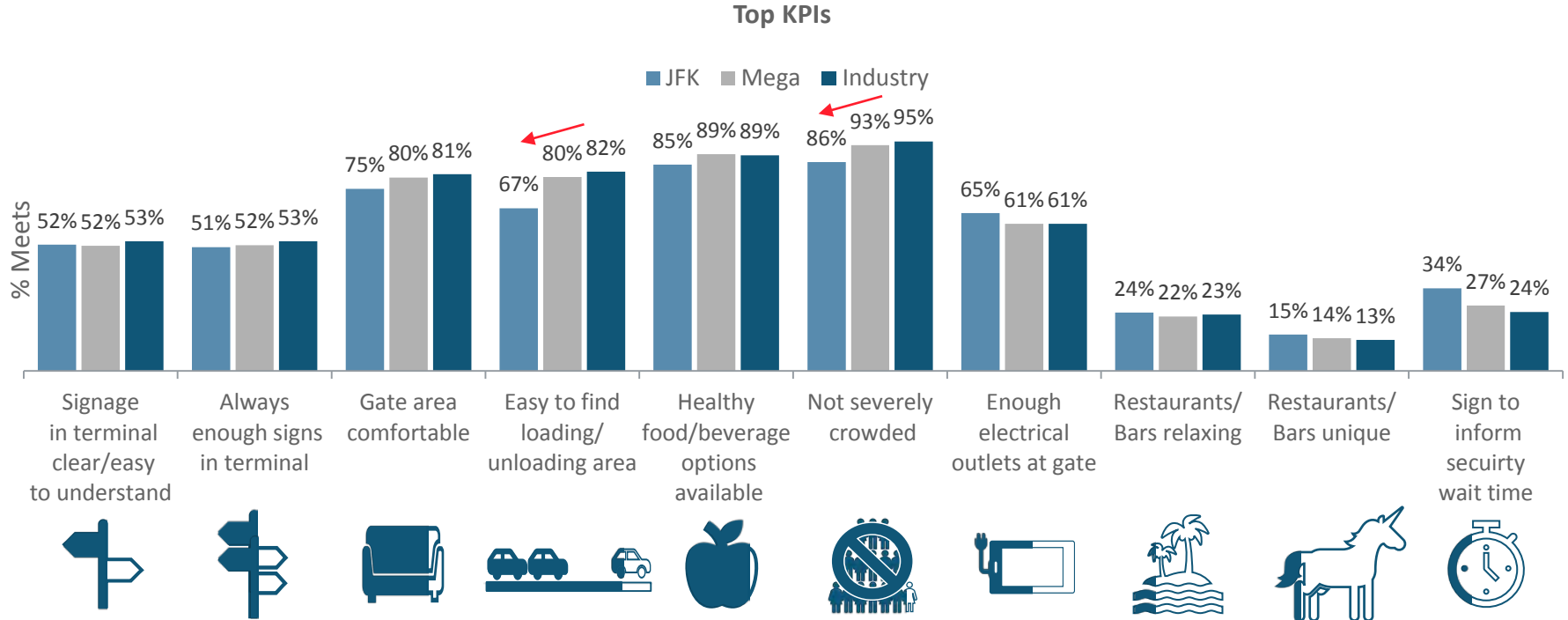
These KPIs have a high impact on Overall Satisfaction, boosting scores 67-157 points

Top KPIs Overall Satisfaction Impacts – Total Industry



Key Performance Indicators

JFK trails the Mega average in easy to find loading/unloading area and not severely crowded





Airport Access

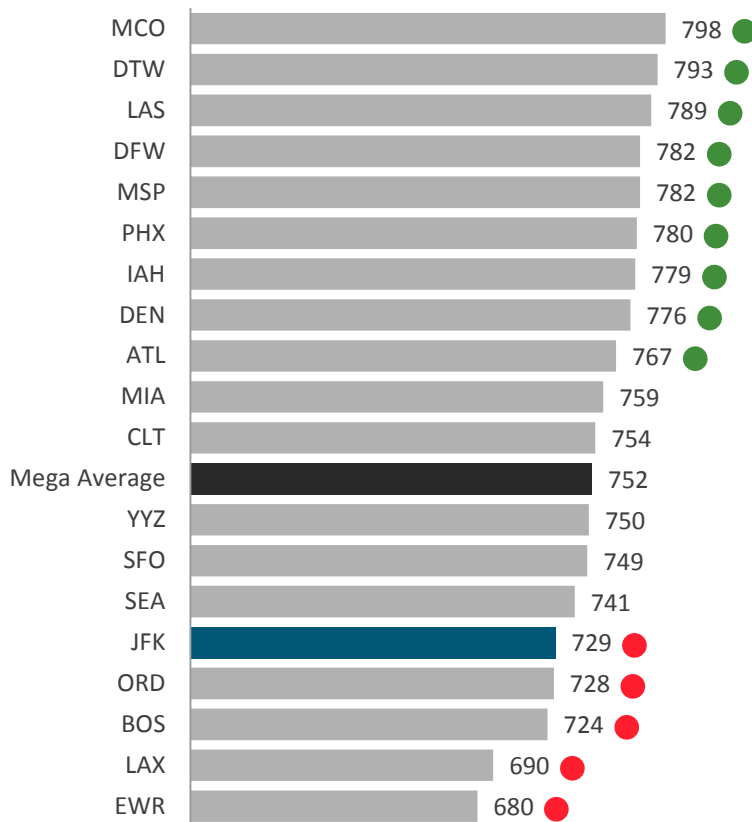
Airport Access Satisfaction

JFK ranks 15th in Airport Access, scoring significantly below the Mega airport average

Congestion on access roads (e.g., Van Wyck) can be a contributing negative factor in passengers' evaluations of Access to airports. This is especially true of most Mega airports, which are located in major metropolitan areas. Adequate DOT signage can help Access scores.

●/● Significant difference at a 90% confidence interval; *Small sample size (n=30-99).

Airport Access Index: Mega Airports



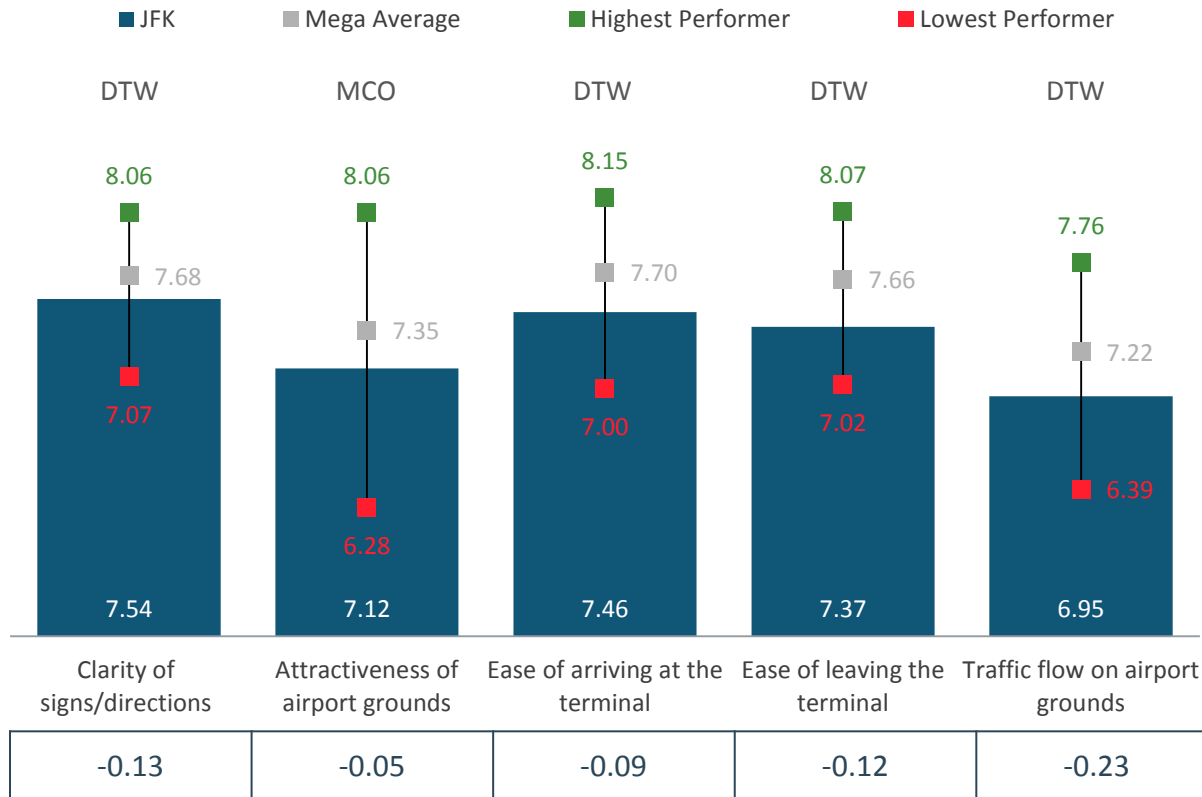
Airport Access

JFK falls below the Mega airport average in all Access attributes

Some of the negative changes from year-ago can be attributed to passenger growth at JFK (+4.4%). More passengers accessing the airport create greater congestion, poorer traffic flow and has an effect on signs/directions evaluations.

*Small sample size (n=30-99); #Insufficient sample size (n<30).

Attribute Performance

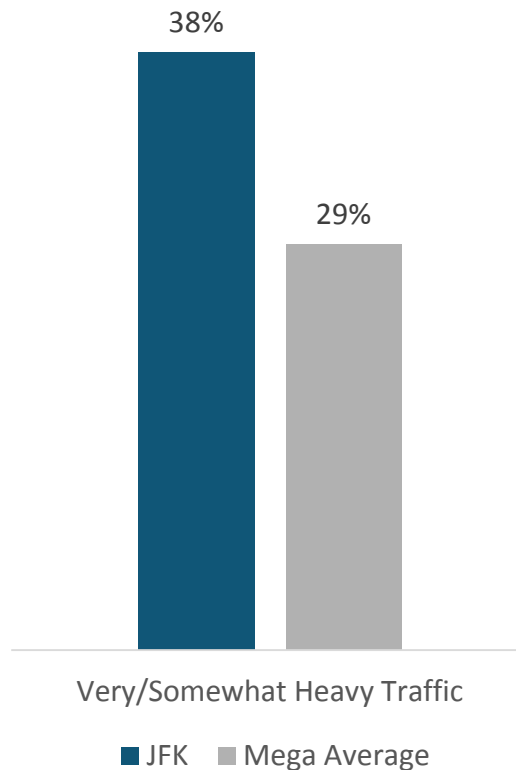


Airport Access

Traffic congestion impacts Airport Access Satisfaction

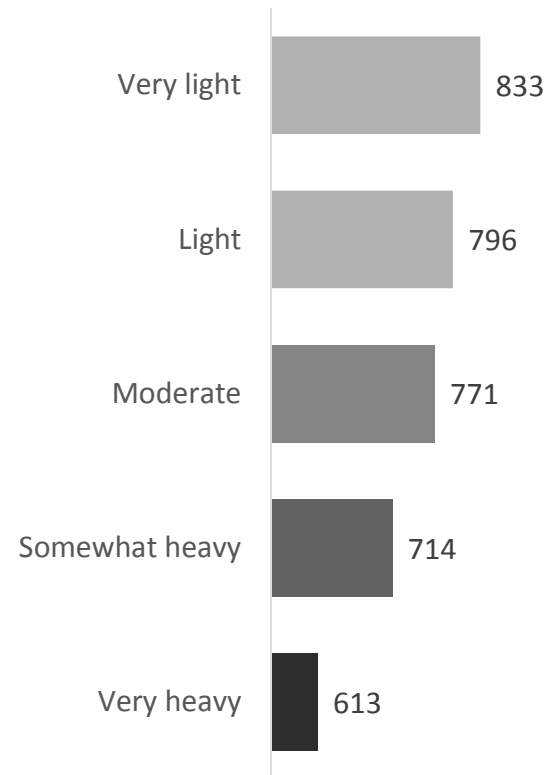
JFK's traffic outside the terminal is perceived as heavier than the Mega airport average.

Traffic Congestion Getting to the Airport



*Small sample size (n=30-99); #Insufficient sample size (n<30).

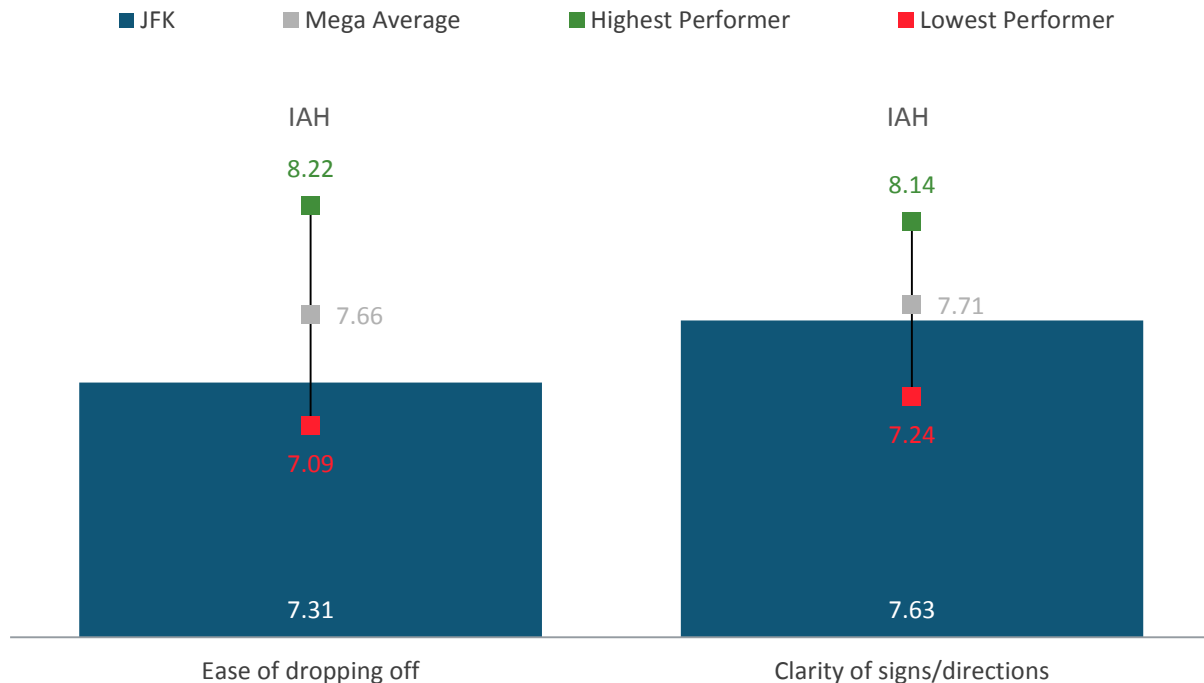
Airport Access Index by Traffic Congestion – Total Industry



Airport Access

JFK performs better in
Clarity of signs/directions
than *Ease of dropping off*

Attribute Performance – Drop Off



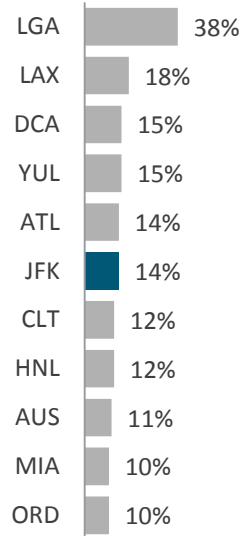
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Airport Access

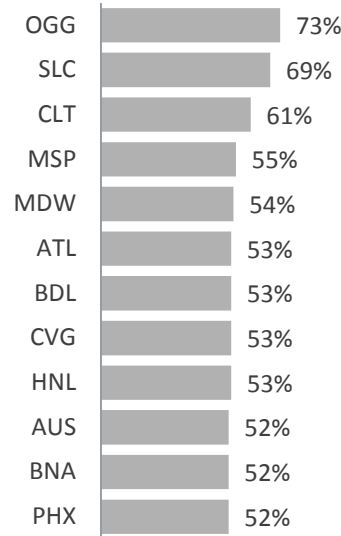
Airport Access satisfaction is 116 points lower when construction delays access to the airport.

Construction delayed access – 641, Construction did not delay access – 757, No construction – 789

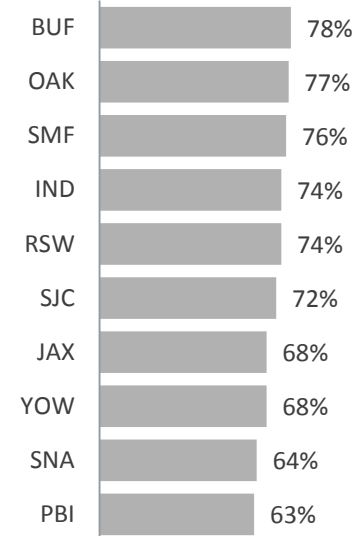
**Construction Present and Delayed
Access**



**Construction Present – Did Not Delay
Access**



Did Not Notice Construction

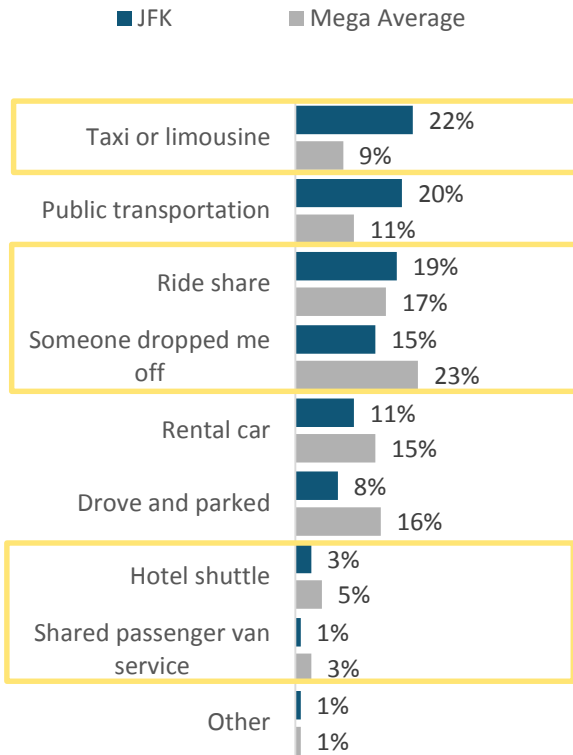


Airport Access

Airport Access is 173 points higher when passengers are able to easily find curb space at Mega airports

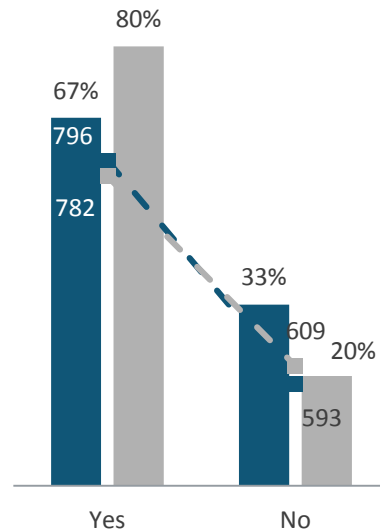
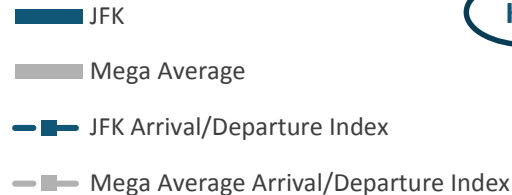
Highlighted responses are those that answer the question “was it easy to find curb space upon arrival?”

How Did You Travel to the Airport?



Easy to Find Loading/Unloading Area

KPI



*Small sample size (n=30-99); #Insufficient sample size (n<30).



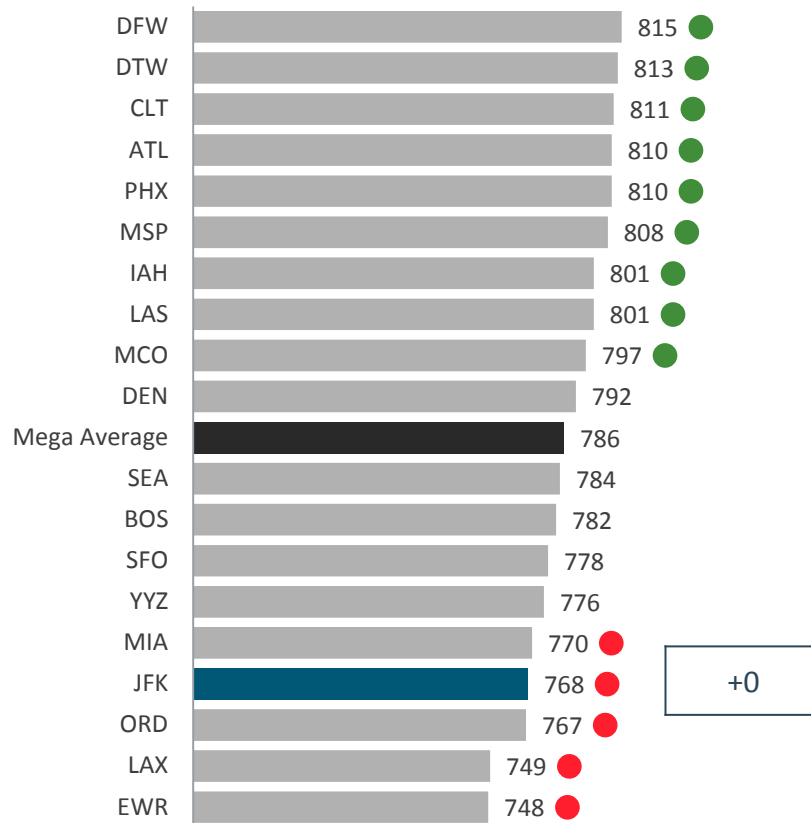
Check-In/Baggage Check

Check-In/Baggage Check Satisfaction

JFK ranks 16th in Check-In/Baggage Check, scoring significantly below the Mega airport average

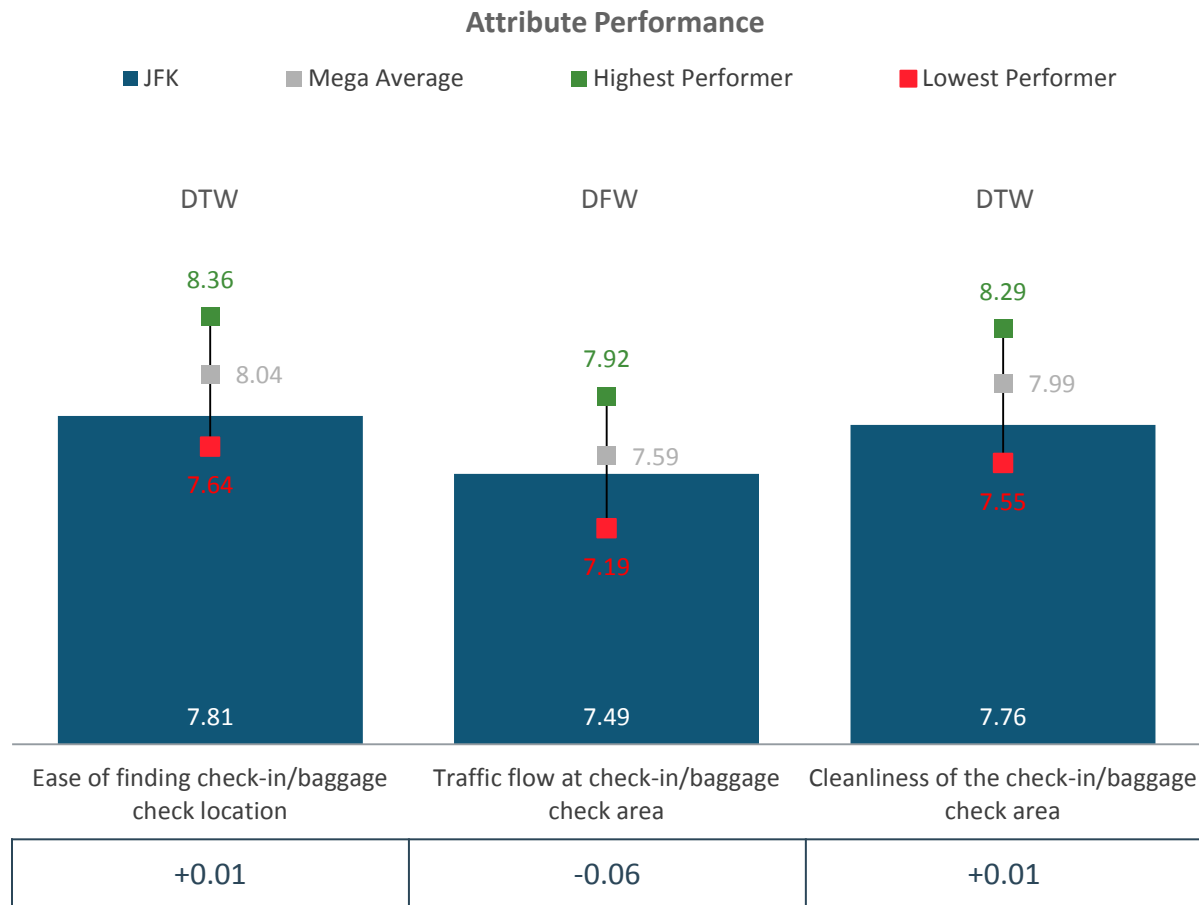
●/● Significant difference at a 90% confidence interval; *Small sample size (n=30-99).

Check-In/Baggage Check Index: Mega Airports



Check-In/Baggage Check

JFK sees gaps to the Mega airport average in *Ease of finding* and *Cleanliness of check-in/baggage check location*



*Small sample size (n=30-99); #Insufficient sample size (n<30).

Check-In/Baggage Check

JFK performs above average in *Traffic flow at check-in* when passengers use the main counter to check-in

Check-In/Baggage Check Attributes by Check-In Method

JFK	Curbside	Self check-in kiosk	Main counter	Online
Ease of finding check-in/baggage check location	8.01*	7.79	7.76	7.88
Traffic flow at check-in	7.59*	7.36	7.66	7.38
Cleanliness of check-in area	7.81*	7.68	7.83	7.78

Mega Average	Curbside	Self check-in kiosk	Main counter	Online
Ease of finding check-in/baggage check location	8.34	8.02	8.00	8.04
Traffic flow at check-in	7.91	7.54	7.61	7.54
Cleanliness of check-in area	8.08	7.98	8.03	7.96

*Small sample size (n=30-99); #Insufficient sample size (n<30).



Security Check

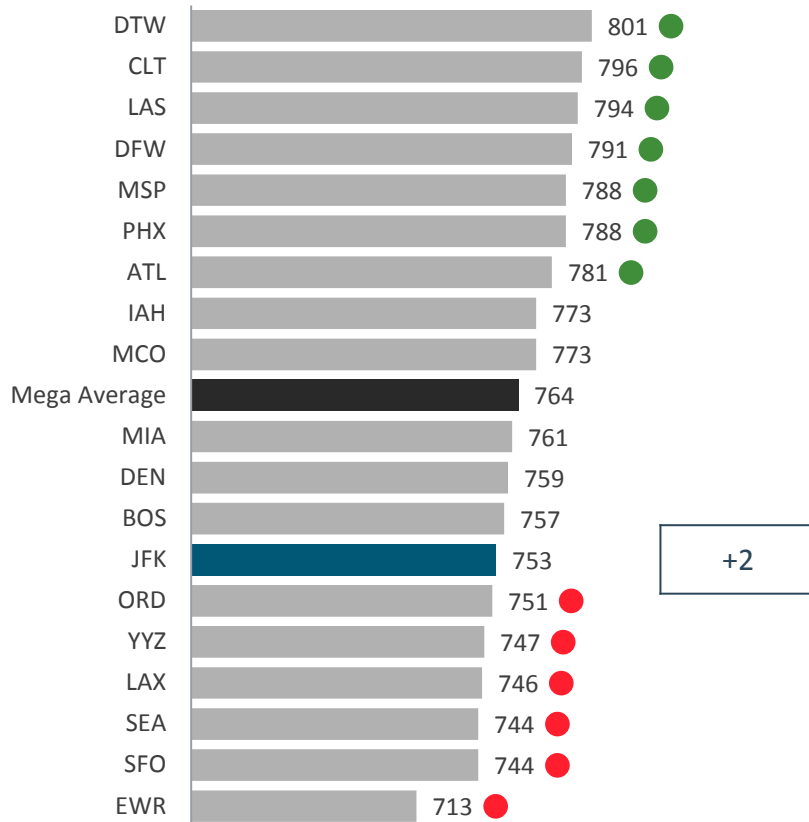
Security Check Satisfaction

JFK ranks 13th in Security Check, scoring 11 points lower than the Mega average

Improvement has been seen since 2018.

●/● Significant difference at a 90% confidence interval; *Small sample size (n=30-99).

Security Check Index: Mega Airports

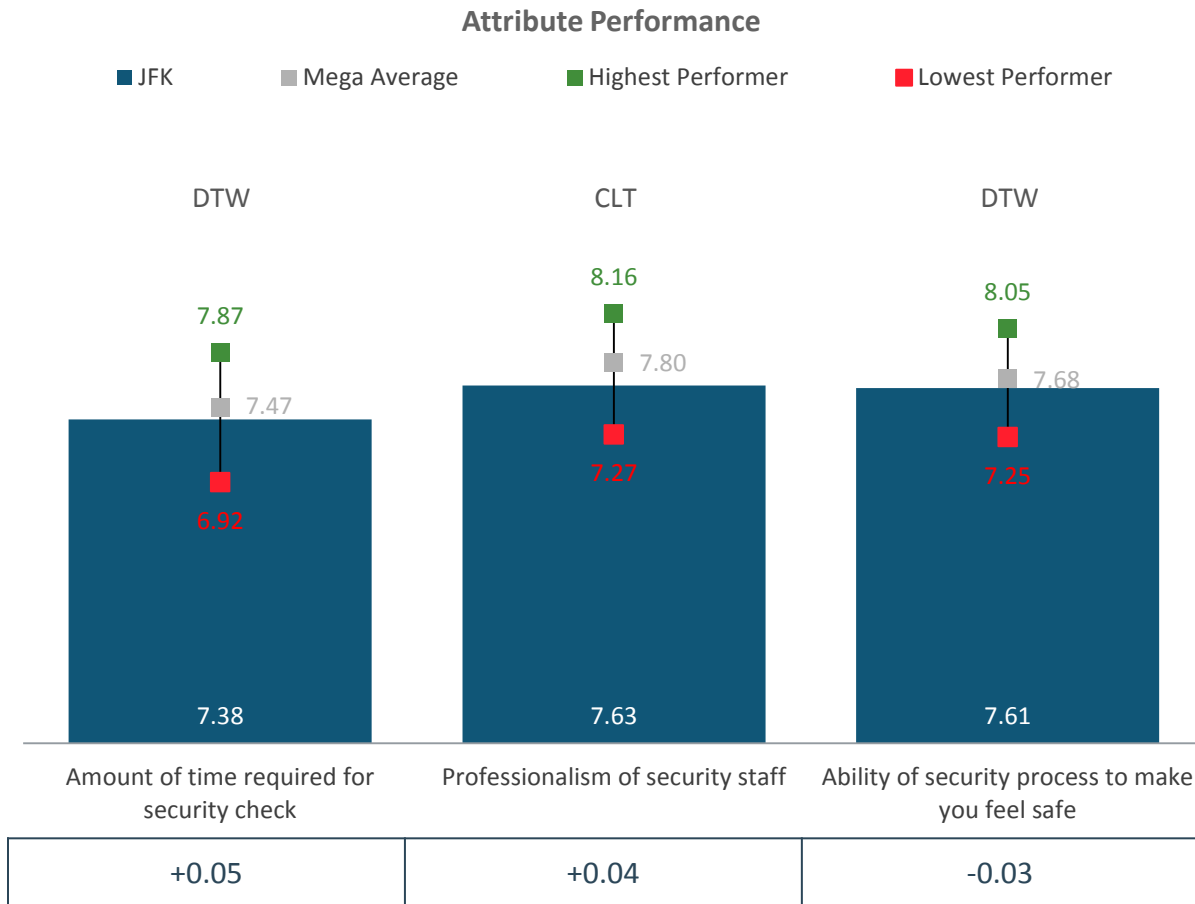


Security Check

JFK's biggest weakness compared to the Mega airport average is *Professionalism of security staff*

The key driver here is "Amount of Time Required." Faster TSA experiences boost all TSA scores.

*Small sample size (n=30-99); #Insufficient sample size (n<30).



Security Check

A speedy security check (10 minutes or less) and appropriate signage increases security check satisfaction

37% of JFK passengers get through security in 10 mins or less.

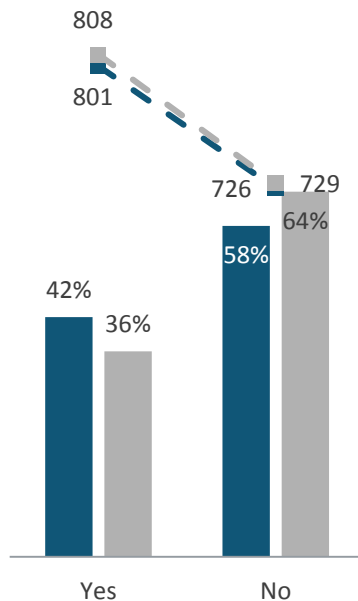
42% of passengers at JFK report seeing signs with security wait times.

*Small sample size (n=30-99); #Insufficient sample size (n<30).

Signage to Inform Security Wait Time by Security Check Satisfaction

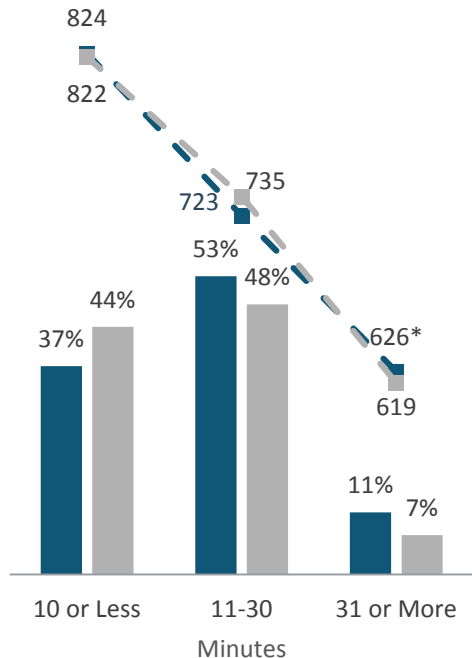
KPI

- JFK
- Mega Average
- JFK Security Check Index
- Mega Average Security Check Index



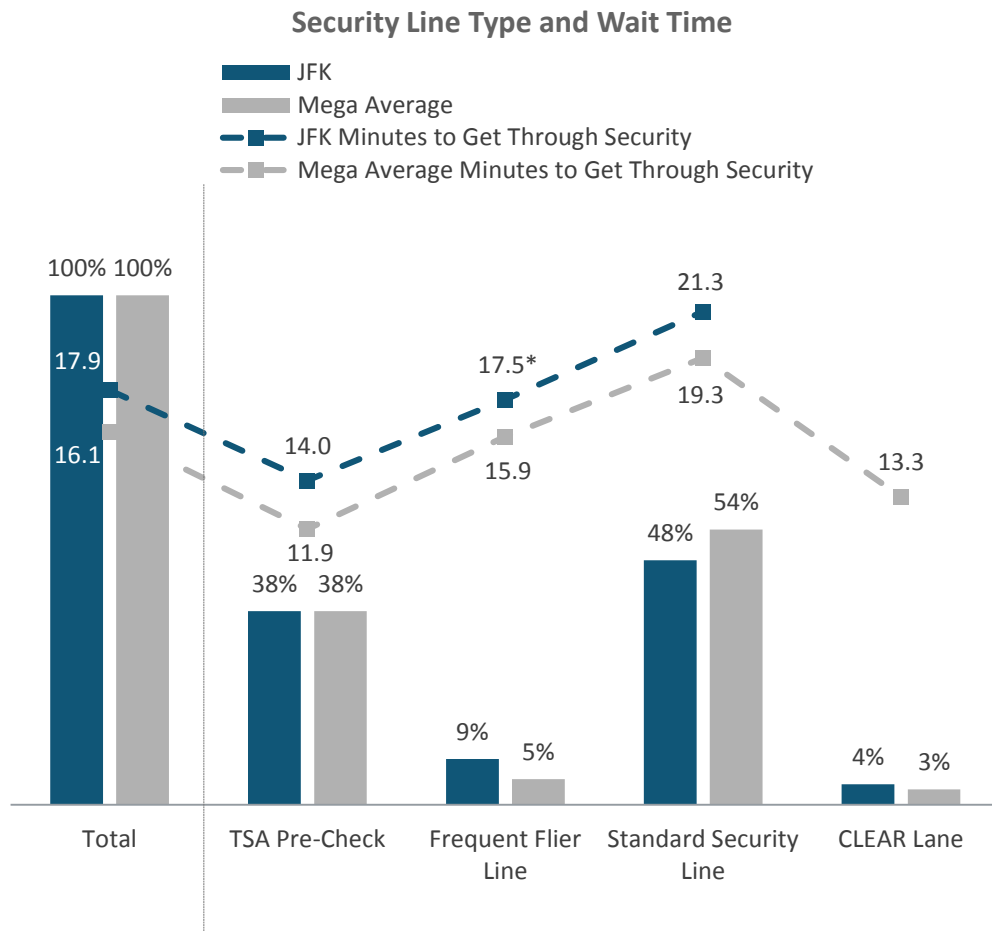
Time to Get Through Security

- JFK
- Mega Average
- JFK Security Check Index
- Mega Average Security Check Index



Security Check

JFK Passengers spend almost two minutes longer getting through security than at the average Mega airport



*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30).



Food/Beverage & Retail Services

Food/Beverage & Retail Services Satisfaction

JFK ranks 8th in Food/Beverage and Retail Services, scoring 7 points above the Mega average

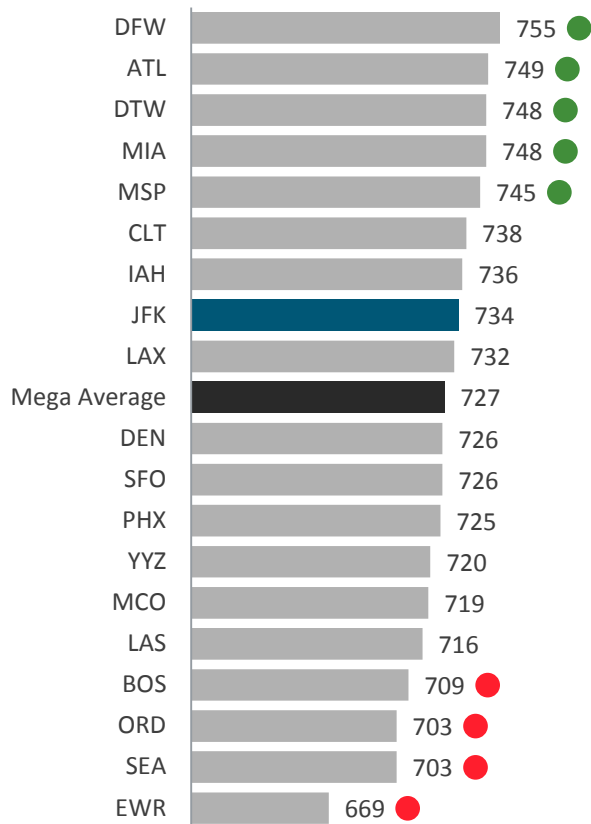
JFK ranked 2 in Food/Beverage and Retail Services in 2018 and 13th in 2017.

Is there anything you look forward to purchasing each time you travel through JFK?

- “Coffee”
- “Alcohol duty free”
- “cosmetics”
- “Souvenirs”

●/● Significant difference at a 90% confidence interval; *Small sample size (n=30-99).

Food/Beverage and Retail Services: Mega Airports



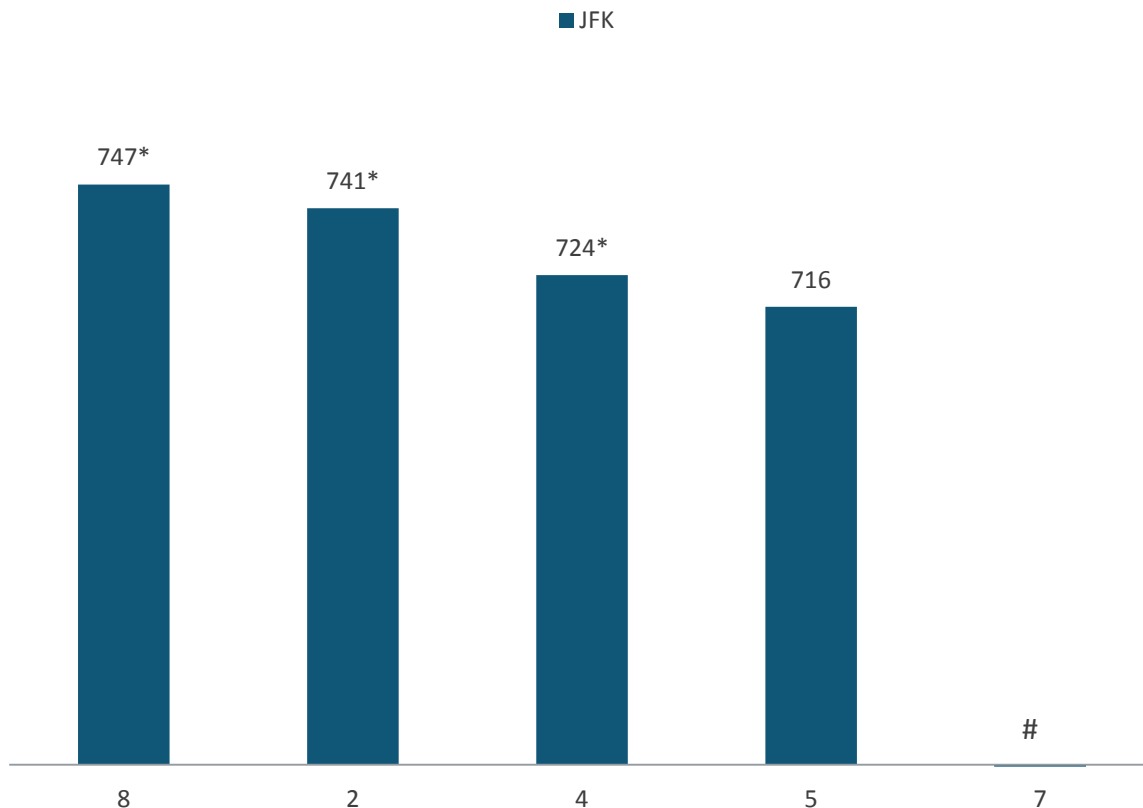
Food/Beverage & Retail Services Satisfaction

Passengers using Terminal 8 are most satisfied with the Food/Beverage and Retail Services at JFK

Terminal 2 F, B and R services are nearer the gate areas, which may account for the slight advantage over Terminals 4 and 5.

*Small sample size (n=30-99); #Insufficient sample size (n<30);
Connecting terminal data not included.

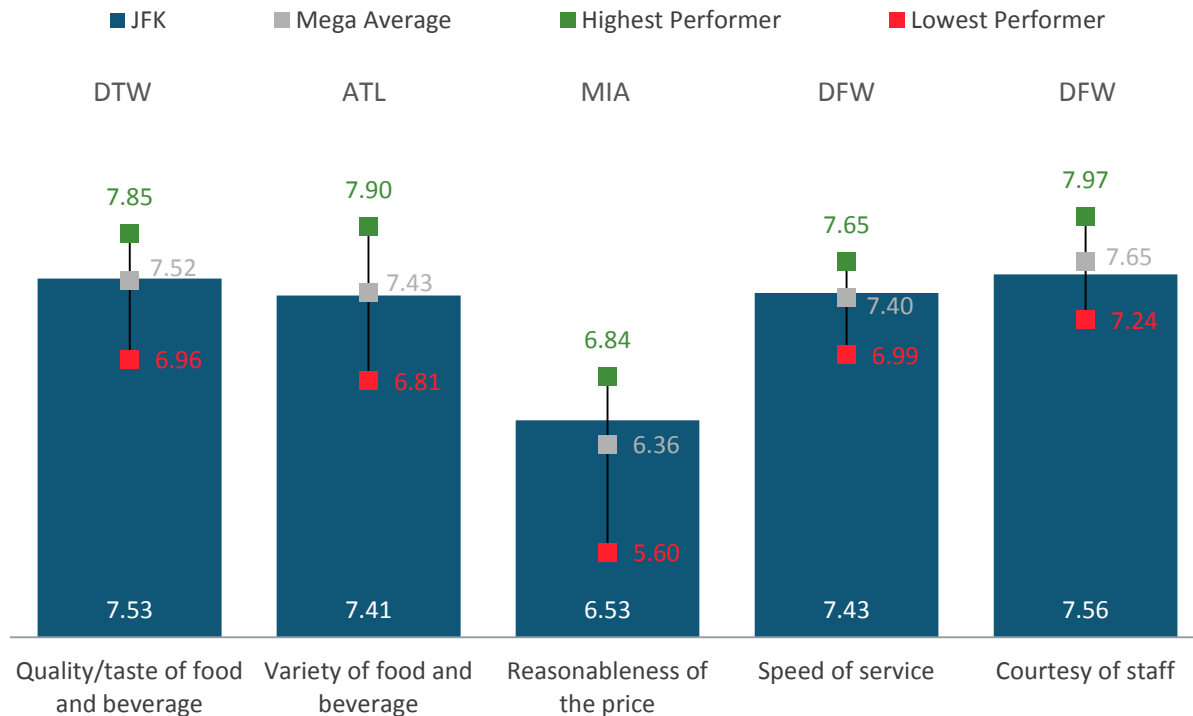
Food/Beverage and Retail Services by Terminal for O&D Passengers



JFK sees a slight advantage in Reasonableness of the price compared to the Mega average

Expectations of price differences and increased choices also play roles in what is a “reasonable” price. Many people expect prices to be higher in the NYC area. Having a range of food/beverage prices in the terminal also helps the “reasonableness” score.

Attribute Performance – Food/Beverage



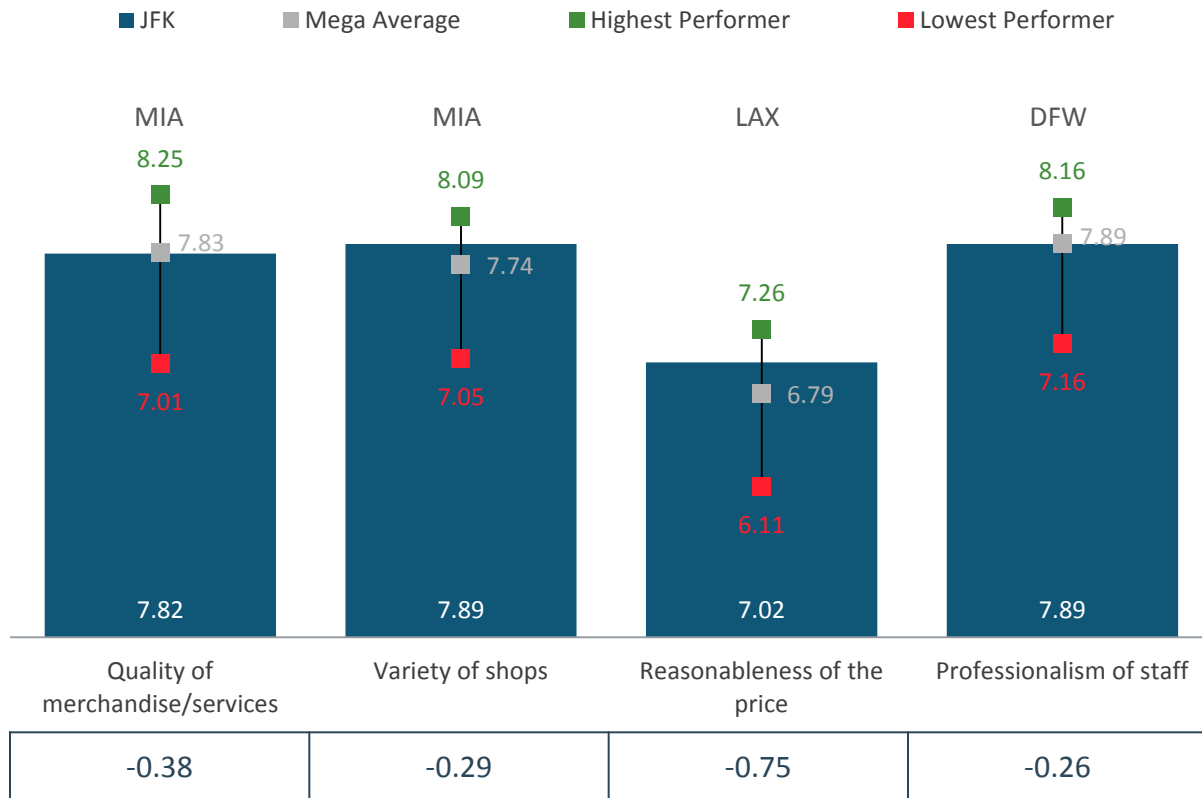
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Food/Beverage & Retail Services

JFK is on par or above the Mega average with all Retail Services attributes

However, all attributes scores are trending lower than 2018.

Attribute Performance – Retail Services



*Small sample size (n=30-99); #Insufficient sample size (n<30).

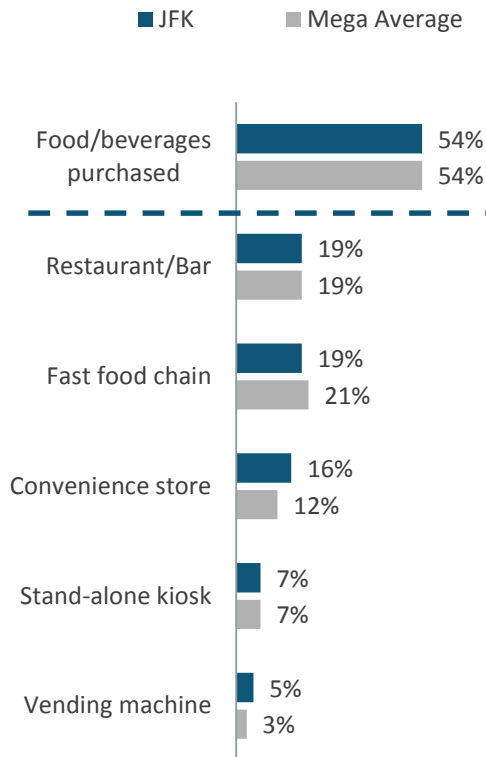
Food/Beverage & Retail Services

54% of JFK passengers purchase food or beverages

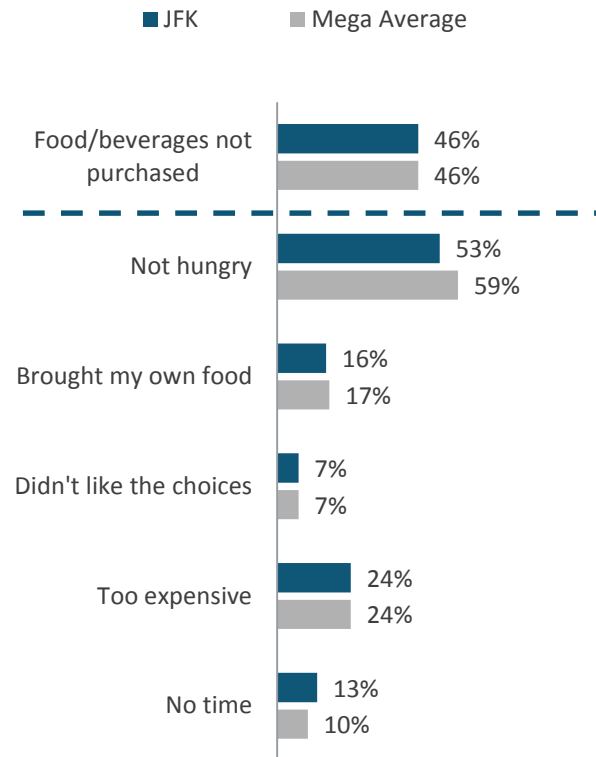
Most JFK passengers purchase food/beverages at restaurants/bars, fast food chains or convenience stores. As only 54% of passengers purchase Food or Beverage, this is an opportunity for both JFK and all Mega airports.

*Small sample size (n=30-99); #Insufficient sample size (n<30).

Purchase Food and/or Beverages



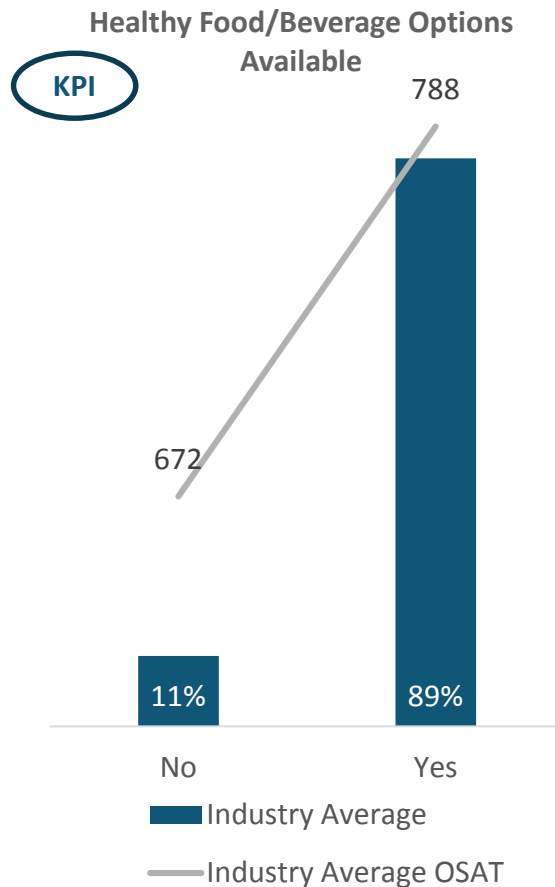
Reason for Not Purchasing



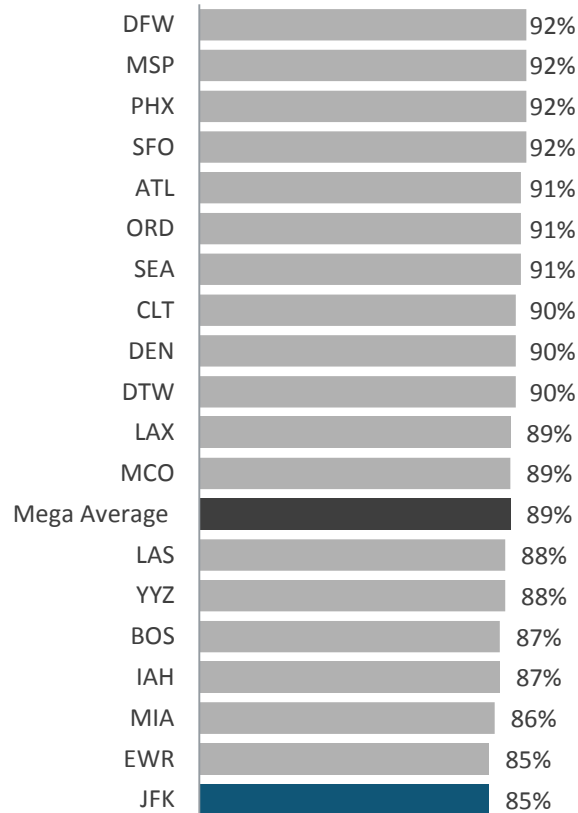
Food/Beverage & Retail Services

Availability of Healthy Food/Beverage options leads to increased overall satisfaction

85% of JFK passengers report health/food options as being available, below the segment average.



Mega Segment % Meets

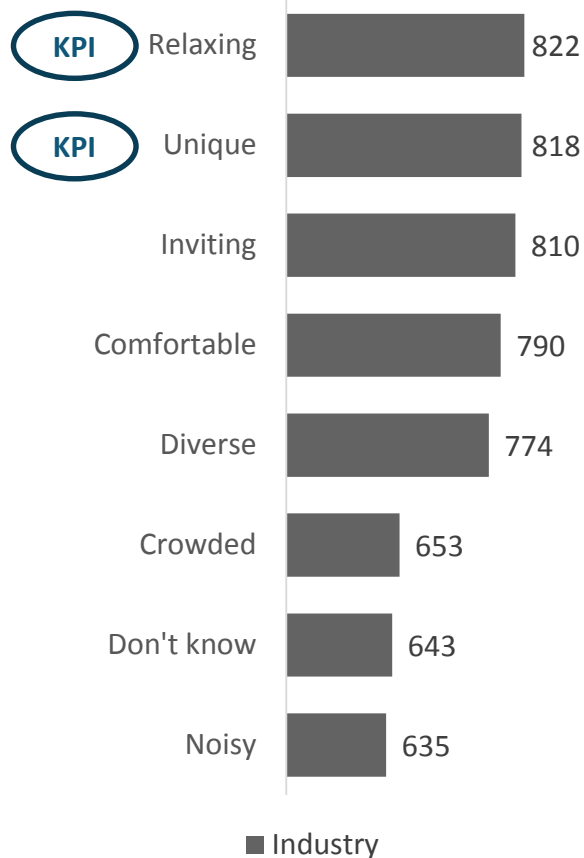


Food/Beverage & Retail Services

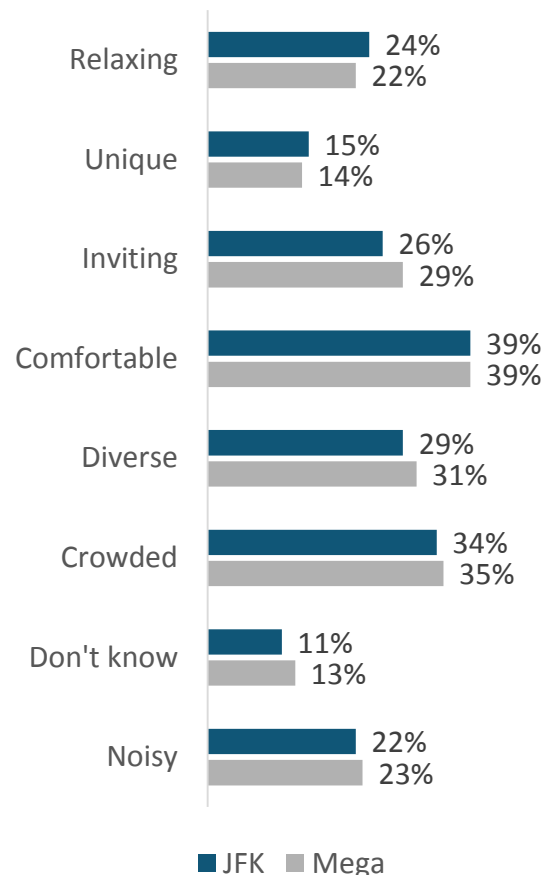
JFK restaurants/bars are described most often as *comfortable* and *crowded*

Terminals that have *relaxing* or *unique* restaurant/bar atmospheres leave passengers feeling the most satisfied with Food/Beverage.

Food/Beverage Satisfaction by Restaurants/Bars in Terminal Seem...



Restaurants/Bars in Terminal Seem...



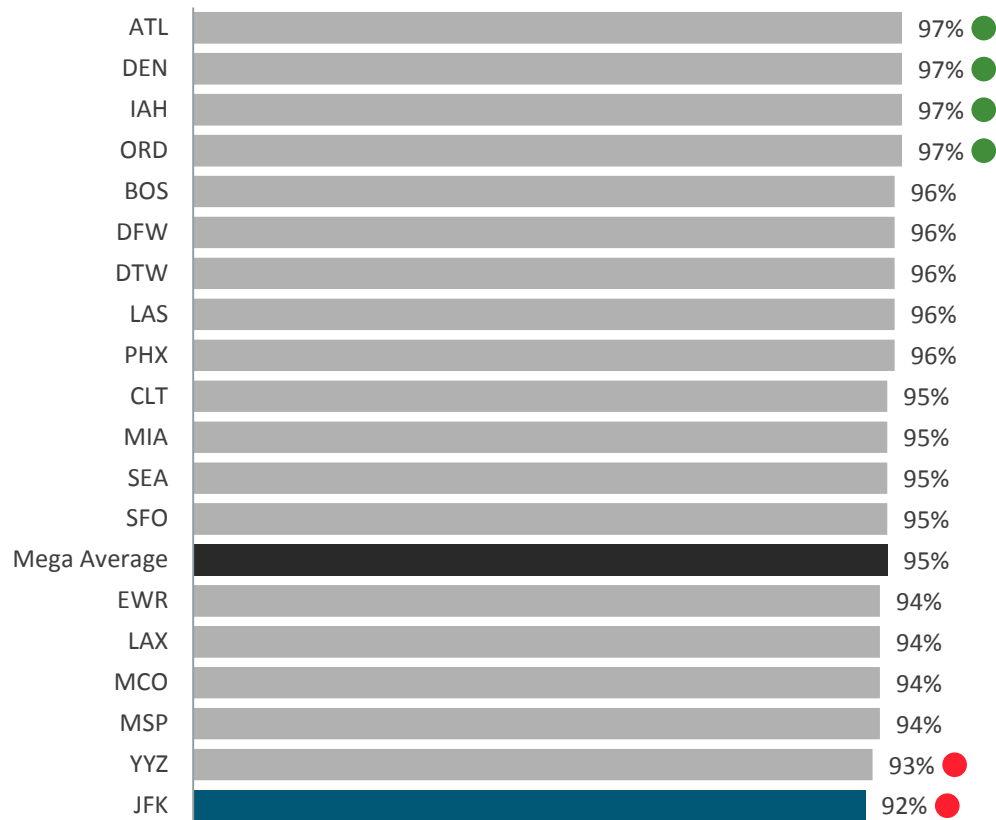
Food/Beverage & Retail Services

Most Mega airport passengers are able to find local food and beverage within the airport

But JFK could improve its perception of “local flavor” as compared to other Mega airports.

●/● Significant difference at a 90% confidence interval; *Small sample size (n=30-99).

Availability of Food & Beverage with Local Flavor: Mega Airports





Terminal Facilities

Terminal Facilities Satisfaction

JFK ranks 10th in Terminal facilities, scoring 6 points above the Mega average and up 32 points from two years ago

JFK ranked 14th in Terminal Facilities in 2018 and 2017.

“Add more seats and electrical plug points.”

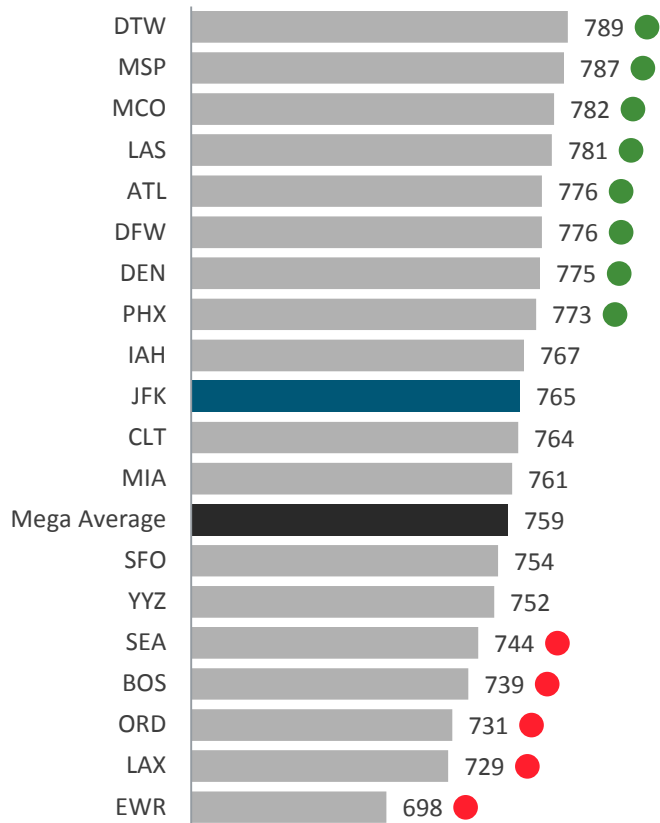
“Better PA system for gate announcements”

“Replace signs to clearly indicate locations. Monitor cleanliness of restrooms to maintain sanitary standards.”

“Alaska gate area is dark, dingy and unwelcoming. Not enough outlets for phones, chairs are uncomfortable and it a very long way to shops and restaurants.”

●/● Significant difference at a 90% confidence interval; *Small sample size (n=30-99).

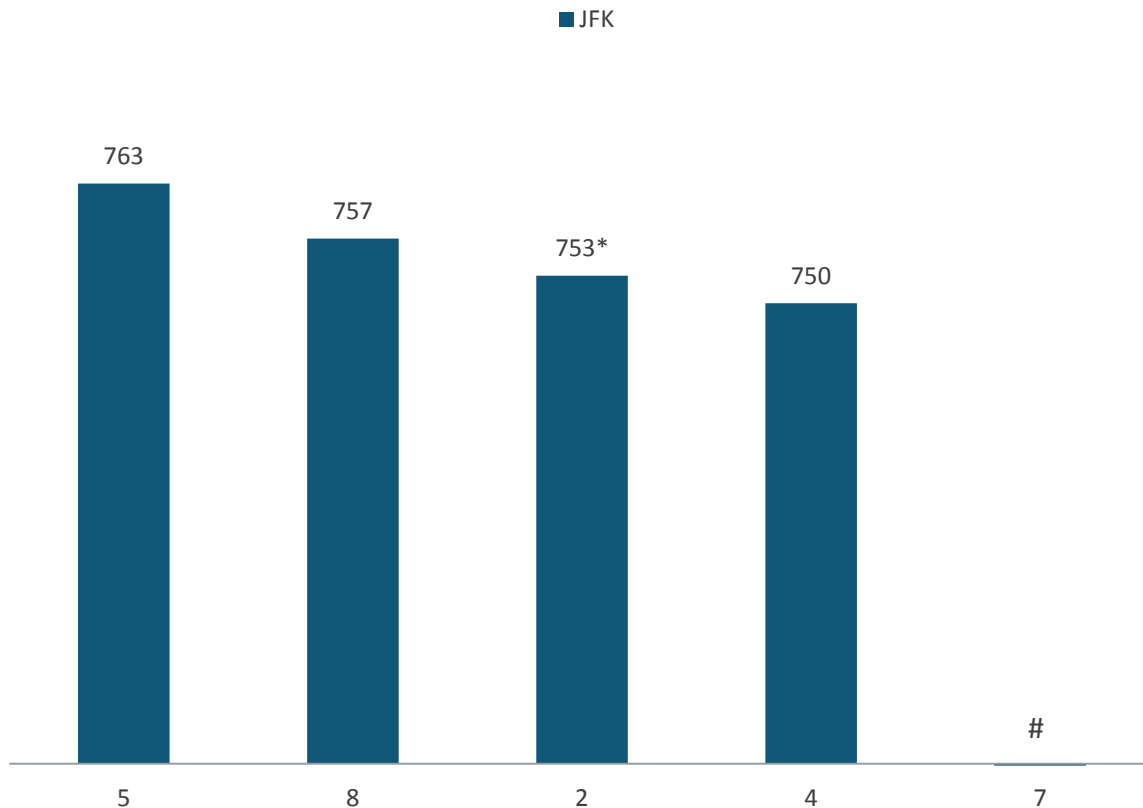
Terminal Facilities Index: Mega Airports



Terminal Facilities

Passengers flying out of terminal 5 have the highest satisfaction with JFK's facilities

Terminal Facilities Index by Terminal for O&D Passengers



*Small sample size (n=30-99); #Insufficient sample size (n<30);
Connecting terminal data not included.

Terminal Facilities

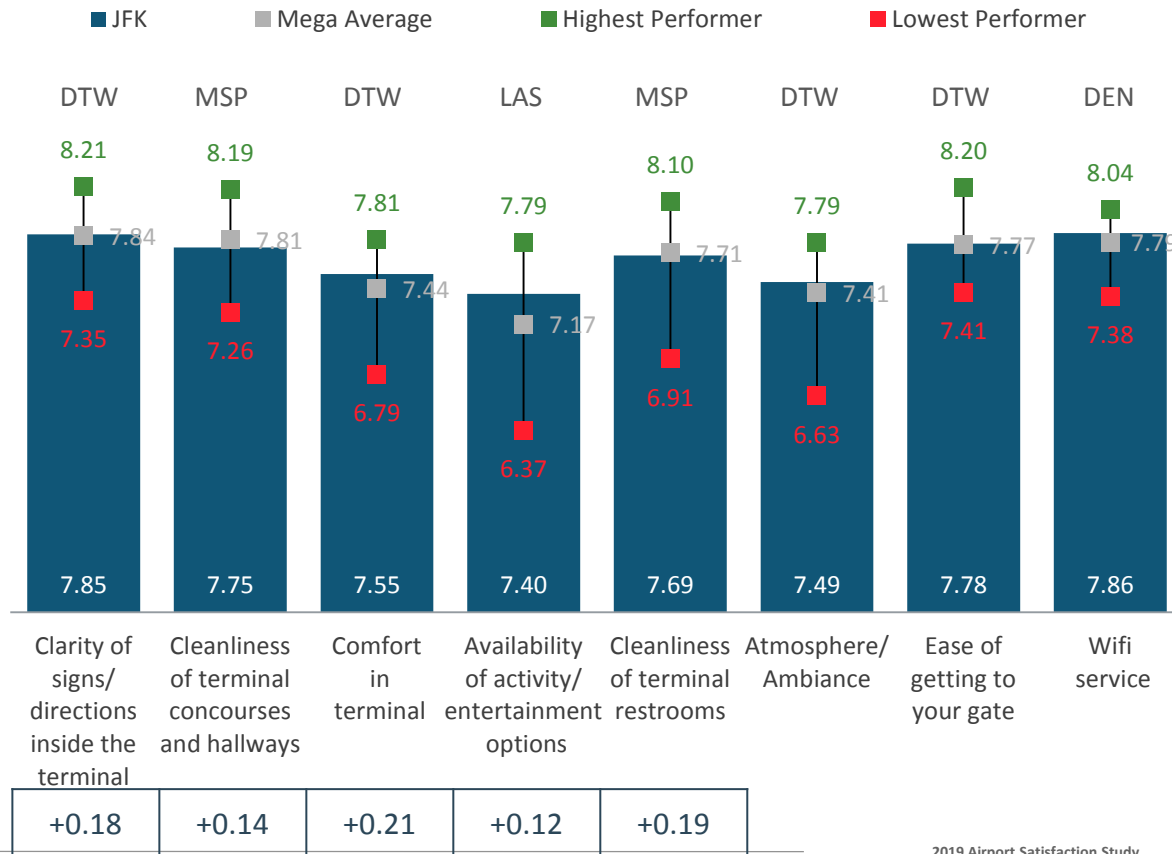
JFK has an advantage in *Comfort in terminal, Availability of activity/entertainment options and Atmosphere/Ambiance*

Cleanliness of concourses and hallways can also be negatively affected by increases in passenger volume.

*Small sample size (n=30-99); #Insufficient sample size (n<30).

J.D. POWER

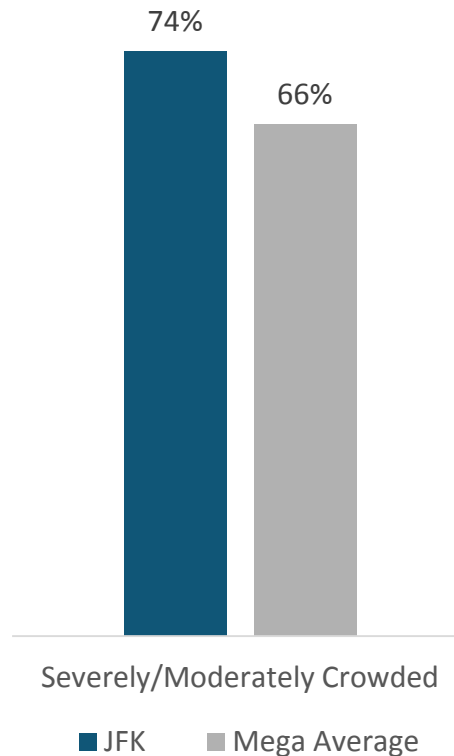
Attribute Performance



Terminal Facilities

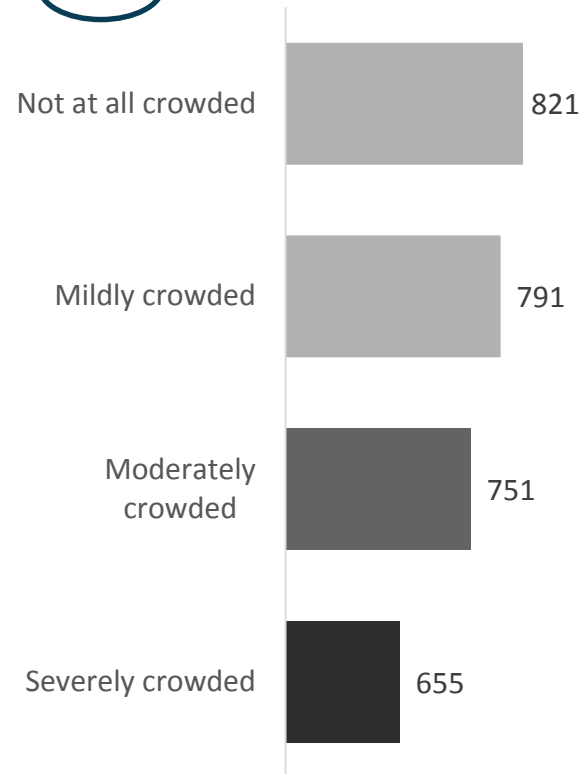
Terminal Facilities satisfaction declines when terminals are perceived as crowded

Crowd Within the Airport Terminal



Terminal Facilities Index by Crowding – Total Industry

KPI



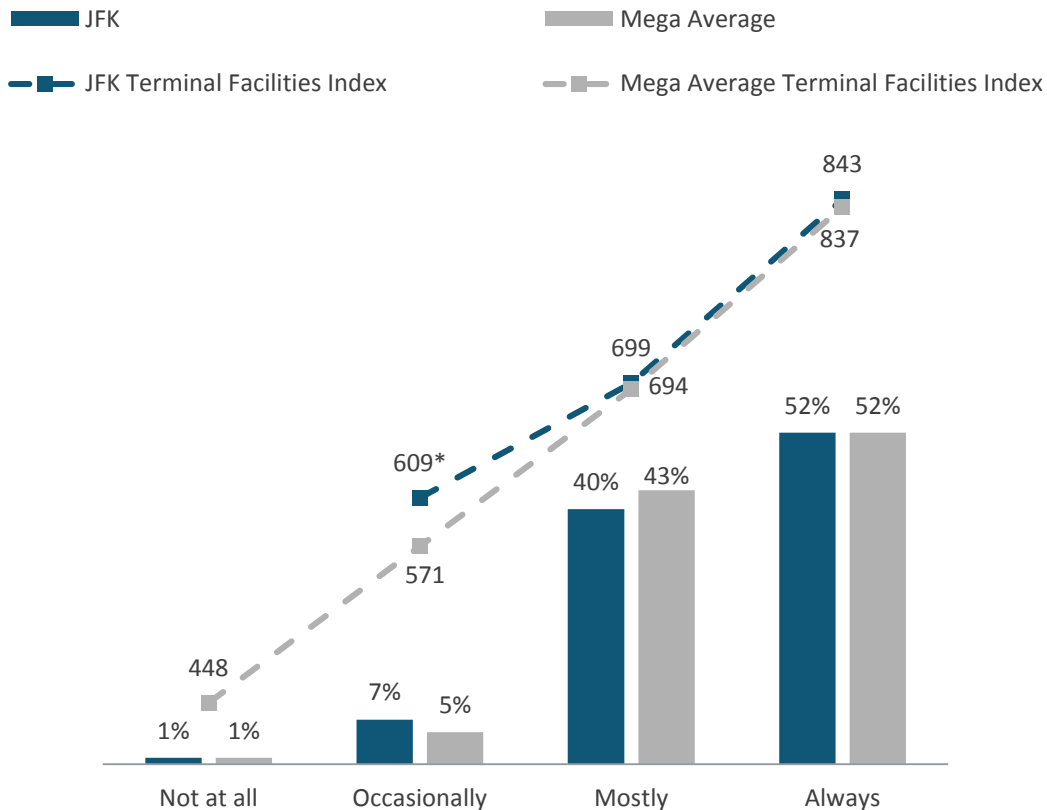
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Terminal Facilities

Easy to understand signage boosts Terminal Facilities Satisfaction

Maintenance of signage programs is critical as terminal facilities are modified/expanded, airline assignments shift, etc. Increased maintenance will move the “Occasionally” into the “Mostly” and “Always” categories.

Signage Easy to Understand

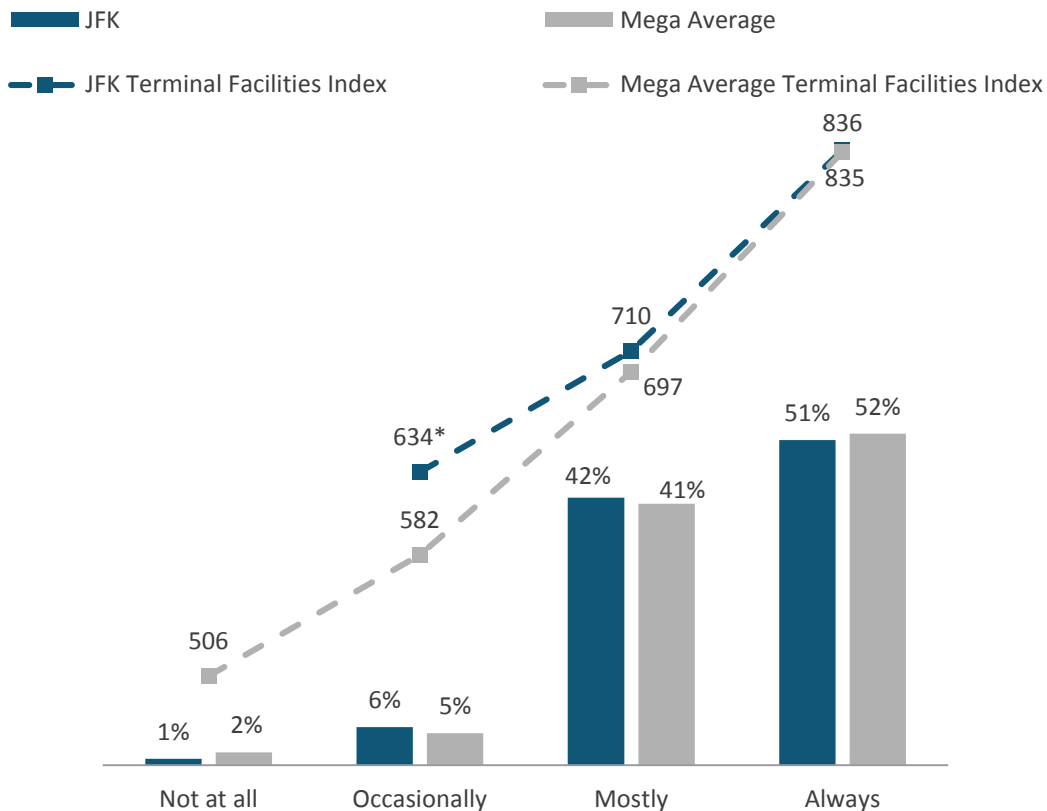


*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30).

Terminal Facilities

Enough signs and directions boost Terminal Facilities Satisfaction

Enough Signs/Directions Throughout Terminal



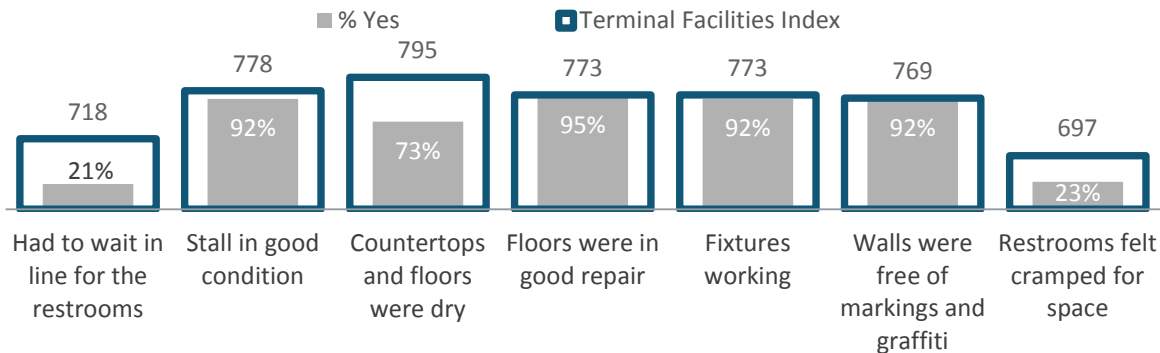
*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30).

Terminal Facilities

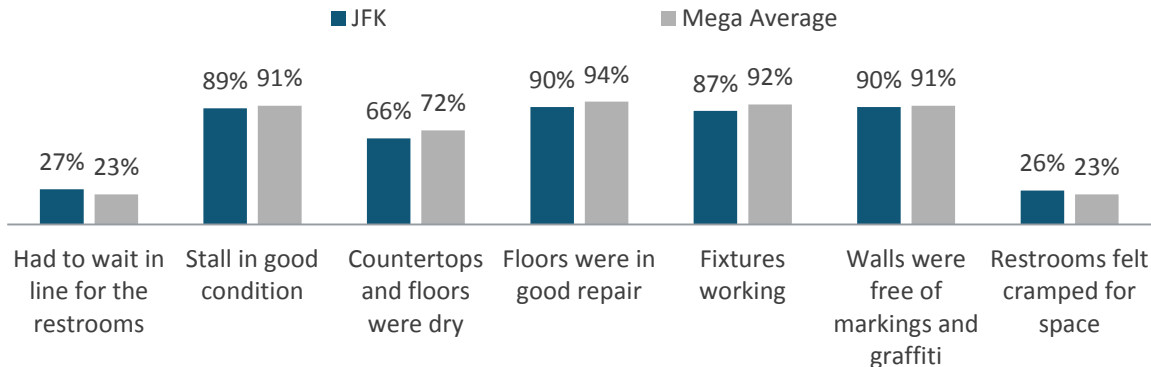
Passenger's perceptions of restroom conditions greatly impact Terminal Facilities Satisfaction

JFK has room to improve restroom scores by keeping fixtures working and countertops and floors dry... a challenge when passenger volumes are up.

Restroom Diagnostics by Terminal Facilities Index – Total Industry



Restroom Components – % Yes



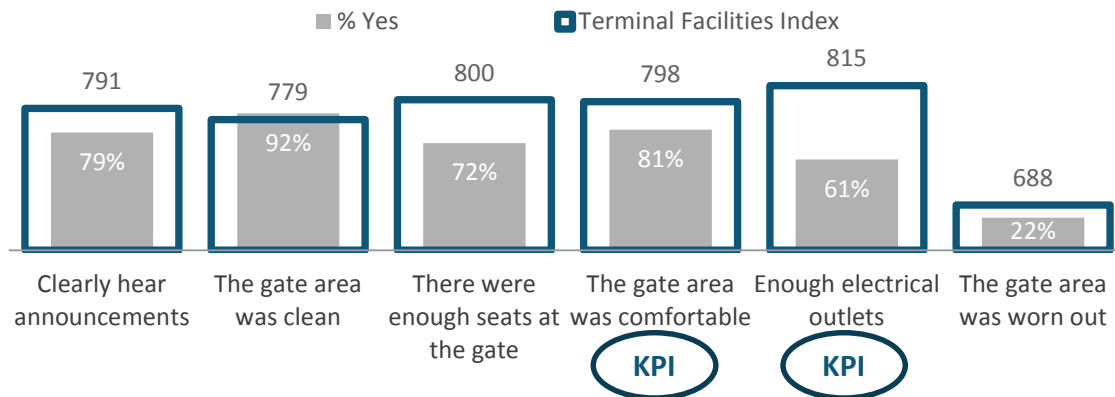
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Terminal Facilities

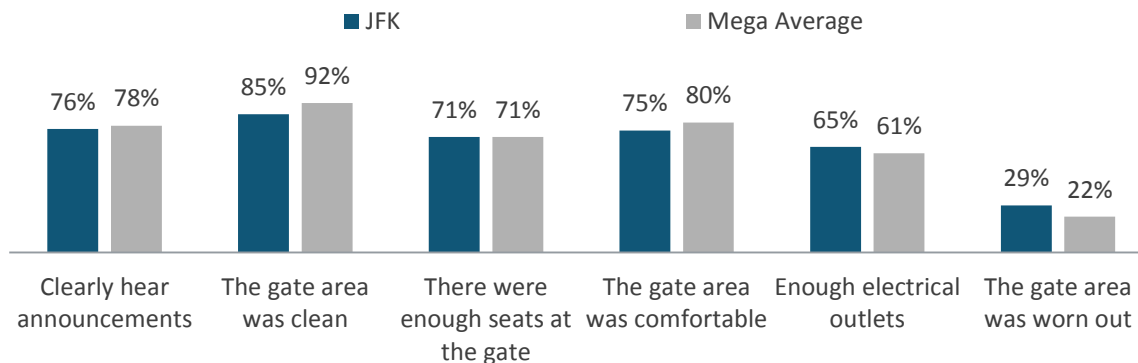
Gate Area Diagnostics – having enough electrical outlets leads to higher Terminal Facilities satisfaction

JFK's gate areas are perceived as more worn out and less clean than the average Mega airport... also a challenge when passenger volumes are increasing.

Gate Area Diagnostics by Terminal Facilities Index – Total Industry



Gate Area Diagnostic Performance



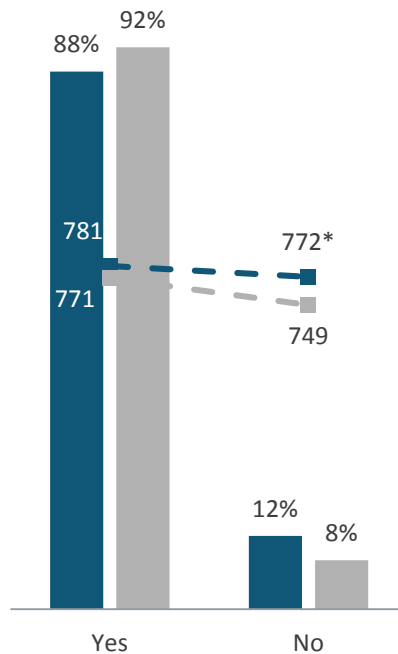
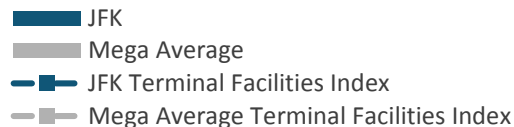
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Terminal Facilities

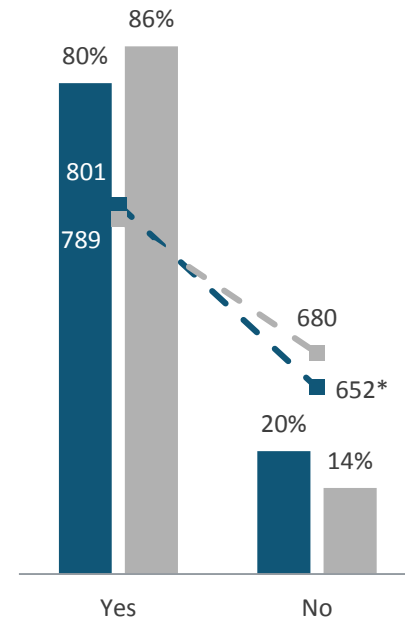
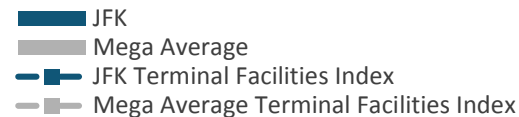
Satisfaction amongst Mega airports is 109 points higher when Wi-Fi is faster or as fast as expected

JFK is slightly behind the Mega average with wi-fi offerings and speed.

Wi-Fi Connection Offered



Wi-Fi Connection Faster Than or As Expected

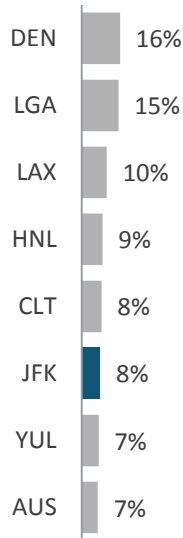


*Small sample size (n=30-99); #Insufficient sample size (n<30).

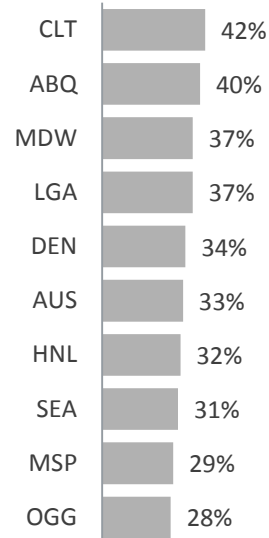
Terminal Facilities

Terminal Facilities Satisfaction is 130 points lower when interior construction is present and disruptive or loud. Construction disruptive or loud – 658, Construction did not disrupt– 761, No construction – 788.

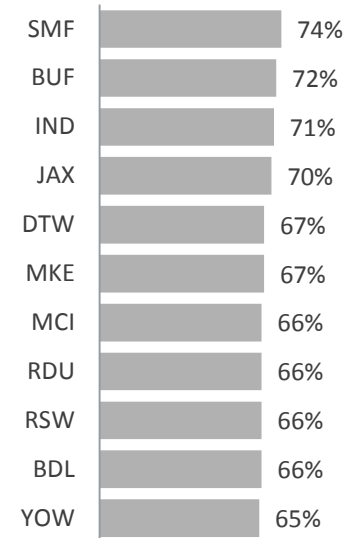
Construction Present and Disruptive or Loud



Construction Present – Did Not Disrupt



No Construction





Baggage Claim

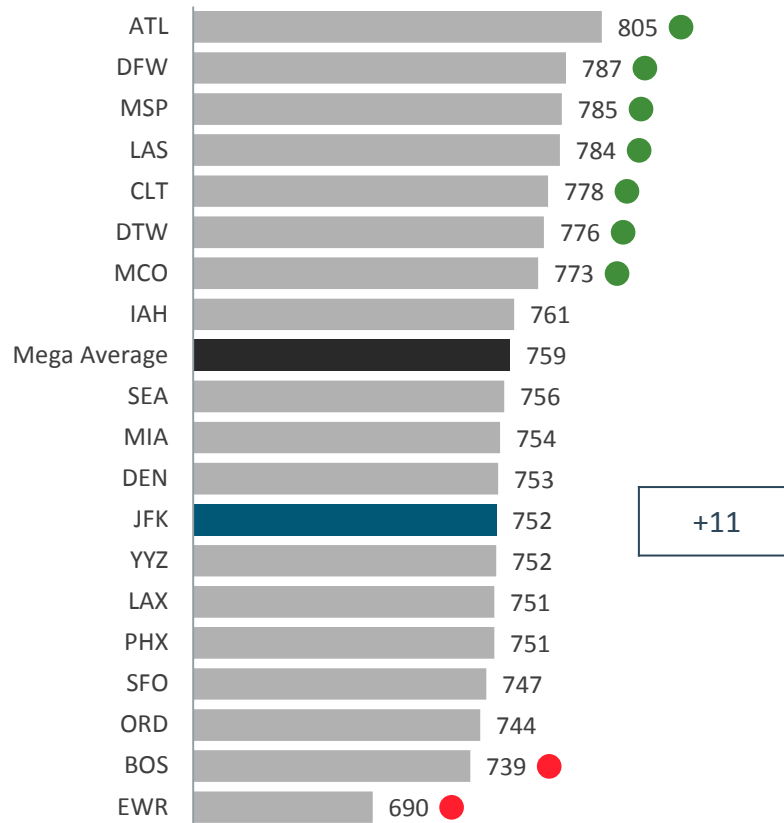
Baggage Claim Satisfaction

JFK ranks 12th in Baggage Claim, 7 points below the Mega average

... but improving from last year.

●/● Significant difference at a 90% confidence interval; *Small sample size (n=30-99).

Baggage Claim Index: Mega Airports



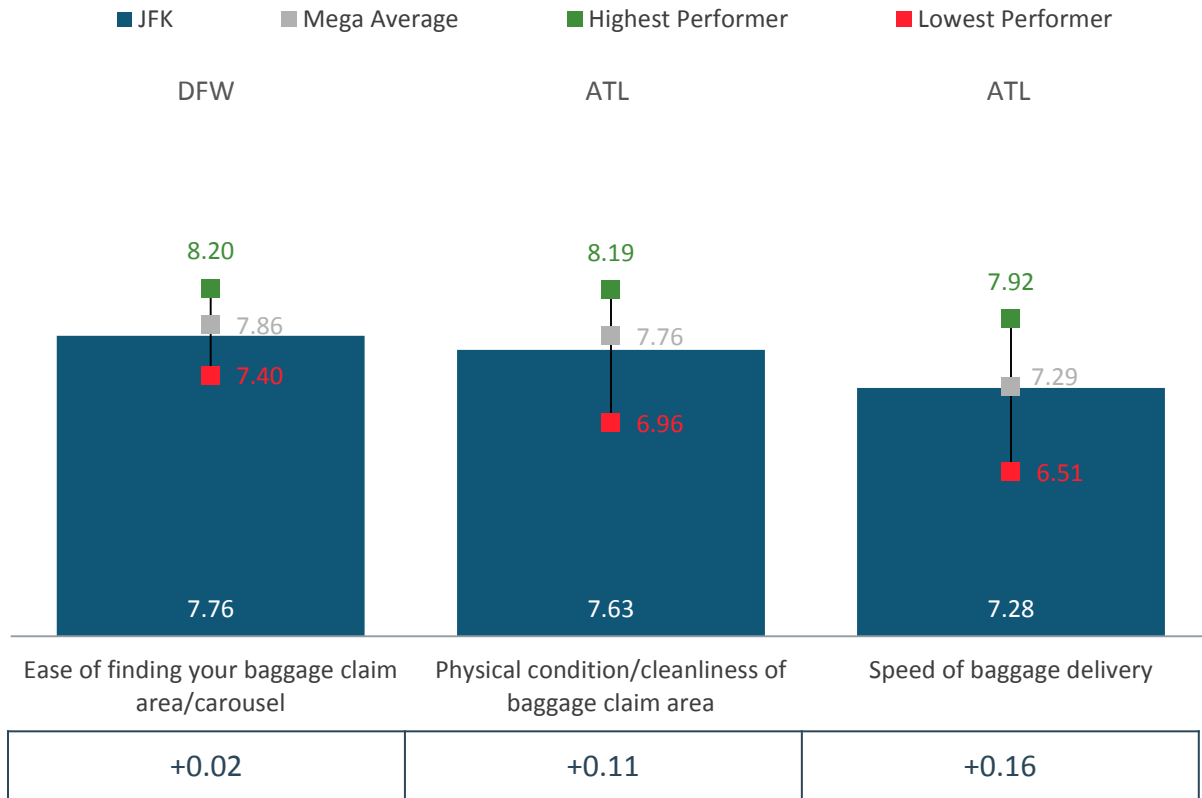
Baggage Claim

JFK performs below the Mega average in all three Baggage Claim attributes

Attributes also show improvement from year-ago.

*Small sample size (n=30-99); #Insufficient sample size (n<30).

Attribute Performance



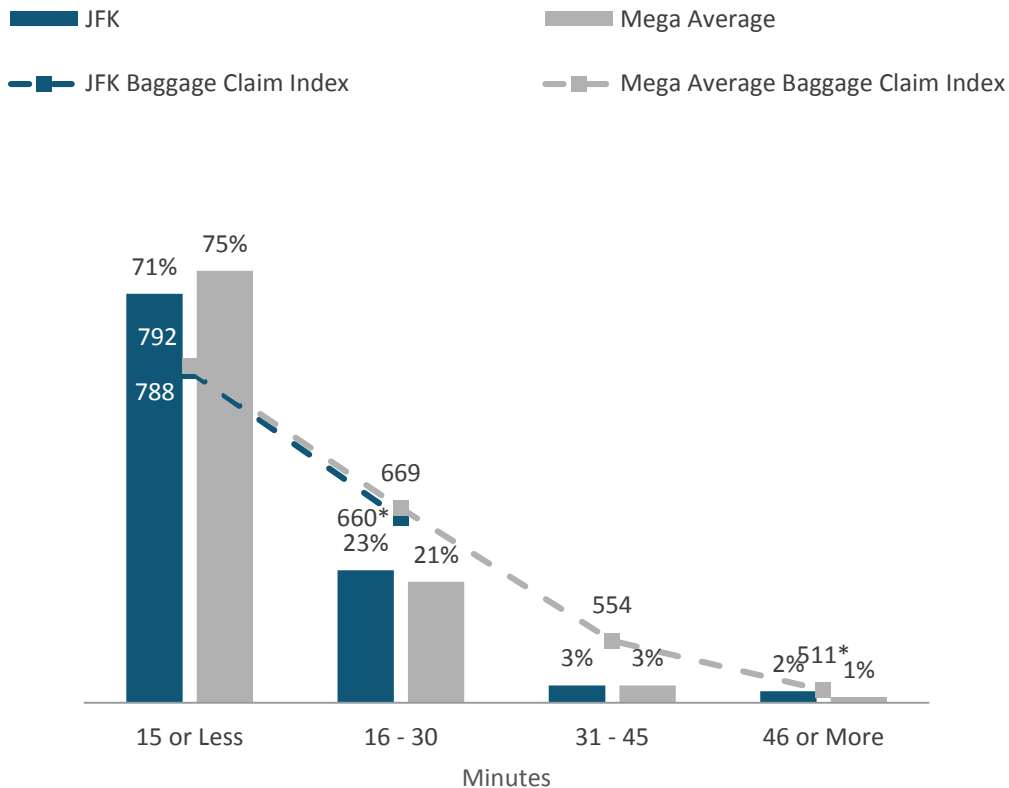
Baggage Claim

Receiving baggage in 15 minutes or less, leads to overall satisfaction that is 123 points above those receiving baggage in 16-30 minutes at Mega airports

JFK passengers wait an average of 15 minutes to receive baggage.

The average Mega airport passenger waits 13 minutes to receive baggage.

Wait Time for Baggage and Baggage Claim Satisfaction



*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30).



Near Term Actions

Action Items

What can JFK do in the near-term to increase satisfaction

Are pick up and drop off areas clearly and consistently identified across all JFK terminals?

Can concessionaires bring more local Food options to the terminals? Can local options be better marketed at JFK?

Parking structure maintenance can be improved, especially in stairwells and in elevators.

Womens' bathroom priorities are a dry sink area, Mens' priorities are a dry floor. Can cleaning crews emphasize these?

Can Variable Message Signs be employed at campus entrance to indicate time to terminals? This would reassure passengers that they “have time” to get to their terminal.

Beyond Measure

Michael Taylor | Michael.Taylor@jdpa.com | 203.856.8039

For more information, please visit:

jdpower.com

J.D. Power does not guarantee the accuracy, adequacy, or completeness of any information contained in this publication and is not responsible for any errors or omissions or for the results obtained from use of such information. Advertising claims cannot be based on information published in this publication. Reproduction of any material contained in this publication, including photocopying in part or in whole, is prohibited without the express written permission of J.D. Power. Any material quoted from this publication must be attributed to J.D. Power.

© 2019 J.D. Power. All Rights Reserved.