



Airport Performance Report

Second Quarter 2018

Summary Results for Aviation Management

July 30, 2018

A Customer Experience Presentation

2018 ACI-ASQ Study Objectives

- ➔ Provide a Customer Satisfaction Evaluation of the airport environment and the services and amenities provided while customers are at the airport.
- ➔ Provide a trended Benchmark Comparison for PA Airports to gauge our performance relative to: 1) PA service initiatives; and 2) the airport industry and our Peer Airports.
- ➔ Advance our understanding of our customers via:
 - Demographics of the Market Base
 - Airport usage and behavior (e.g., airport access, kiosk check-in)
- ➔ Provide Business Intelligence to manage performance and provide guidance for marketing, planning, investment and service initiatives.

Methodology at a Glance

- ➔ **ACI's Airport Service Quality (ASQ) is a monthly benchmarking program aggregated to a quarterly report.**
- ➔ **More than 330 airports worldwide participate in the study to ascertain their passengers' views with respect to its airport's products, services and amenities vis-à-vis:**
 - ✓ Other worldwide airports by traffic type, size, region, benchmark, etc.;
 - ✓ Their particular importance for a specific airport, and;
 - ✓ How passengers' perceptions and priorities are evolving over time.
- ➔ **The ASQ Survey Questionnaire Design**
 - ✓ 34 items where passengers are asked to rate specific service related topics and their overall satisfaction with the airport on a scale of 1 (poor) to 5 (excellent)
 - ✓ 21 questions related to the passenger profile.
- ➔ **Sample Composition and Stratification**
 - ✓ The questionnaire is self-completed by randomly selected passengers at the boarding gates of pre-selected flights. Flights are selected based on destination and carrier in order to obtain a representative stratified sample of all departures from the airport, covering all operating hours, with each day of a week evenly distributed between each month of a quarter. Data are weighted according to the proportion of actual international traffic and actual domestic traffic, when applicable.

Participating Airports Q2 2018

➔ In Q2 2018, 332 airports have participated in the ACI ASQ Survey.

➔ 161,676 passengers have completed the ASQ Survey, including 1,024 at JFK, 721 at EWR, and 701 at LGA.

	< 2 M	2 - 5 M	5 - 15 M	15 - 25 M	25 - 40 M	> 40 M	TOTAL
AFRICA	13	6	6	1			26
	<i>BFN, BZV, EBB, ELS, GRJ, HRE, KIM, LFW, MBA, PLZ, PNR, UTN, VFA</i>	<i>ABJ, ABV, ACC, LOS, MRU, RAK</i>	<i>ADD, CMN, CPT, DUR, NBO, TUN</i>	<i>JNB</i>			
ASIA PACIFIC	10	29	24	14	8	19	104
	<i>BTJ, BWX, DJB, DTB, NTL, PGK, PPT, TNJ, TSV, VNS</i>	<i>ATQ, BBI, BDO, CCJ, CJB, DRW, GAU, IDR, IXB, IXC, IXE, JAI, KOE, LKO, LOP, MDC, MLE, PAT, PDG, PKU, PLM, PNH, PNK, REP, SOC, SXR, TRV, VTZ, YIH</i>	<i>ADL, AMD, BPN, CGQ, CHC, CNS, CNX, COK, GOI, HET, HLP, INC, ITM, KHN, KNO, MFM, OOL, PEN, PER, PNQ, RGN, SJW, UPG, WLG</i>	<i>AKL, BNE, CCU, DPS, HAK, HRB, HYD, MAA, SHE, SUB, SYX, TAO, TSN, WUH</i>	<i>BLR, CKG, DMK, GMP, HGH, KIX, MEL, NKG</i>	<i>BKK, BOM, CAN, CGK, CTU, DEL, HKG, ICN, KMG, KUL, NRT, PEK, PVG, SHA, SIN, SYD, SZX, TPE, XIY</i>	
EUROPE	24	19	36	13	9	9	110
	<i>AES, BOO, EAS, GRO, GRX, INV, JER, KRS, LCG, LEI, MJV, MLN, OVD, PDL, PNA, REU, SDR, SKP, SPC, VDE, VGO, VLL, XRY, ZAZ</i>	<i>ABZ, BIO, BMA, FNC, LCY, LPL, MAH, PFO, SCQ, SOU, SVG, TBS, TFN, TLL, TOS, TRD, TRN, VNO, ZAG</i>	<i>ACE, AER, ALC, BGO, BHX, BLQ, BRS, BSL, BUD, CIA, EDI, ESB, FAO, FUE, GLA, GOT, IBZ, KEF, KRK, LCA, LIN, LPA, LYS, MLA, MRS, NAP, NCE, NCL, OPO, OTP, RIX, SVQ, SXF, TFS, TLS, VLC</i>	<i>AGP, ATH, BRU, DUS, GVA, HAM, HEL, LED, MXP, PRG, TXL, VIE, WAW</i>	<i>ARN, CPH, DME, DUB, LIS, ORY, OSL, PMI, ZRH</i>	<i>AMS, BCN, CDG, FCO, LGW, LHR, MAD, MUC, SVO</i>	
LATIN AMERICA / CARIBBEAN	10	11	7	3	1		32
	<i>BDA, BRC, CUR, GPS, KIN, LIR, MDZ, POP, SAP, SLA</i>	<i>AUA, BGI, COR, GYE, NAS, POS, PVR, SDQ, SJD, SJO, UIO</i>	<i>AEP, CNF, EZE, GDL, PTY, PUJ, TIJ</i>	<i>CUN, GIG, SCL</i>	<i>BOG</i>		
MIDDLE EAST	1		5	3	1	1	11
	<i>SLL</i>		<i>AMM, BAH, DMM, MCT, MED</i>	<i>AUH, THR, TLV</i>	<i>RUH</i>	<i>DXB</i>	
NORTH AMERICA	10	6	12	5	7	9	49
	<i>LAN, PWM, YLW, YMM, YQB, YQM, YQR, YXE, YYJ, YYT</i>	<i>ELP, GRR, YHZ, YOW, YTZ, YWG</i>	<i>AUS, CLE, CMH, CVG, IND, JAX, MKE, PIT, SAT, SJC, STL, YEG</i>	<i>DAL, SAN, SLC, TPA, YUL</i>	<i>BOS, BWI, DTW, FLL, LGA, MSP, PHL</i>	<i>ATL, DEN, DFW, EWR, JFK, LAX, SEA, SFO, YYZ</i>	
TOTAL	68	71	90	39	26	38	332

Customized Peer Airport Panels

- The following airports form the Port Authority's Peer Airport Panel. Airports are selected primarily based on passenger traffic, passenger composition and airport location/infrastructure.

JFK PEER AIRPORTS

IATA

CODE AIRPORT NAME

AMS	AMSTERDAM AIRPORT SCHIPHOL
ICN	INCHEON INT'L AIRPORT
JFK	JOHN F. KENNEDY INT'L AIRPORT
LAX	LOS ANGELES INT'L AIRPORT
LHR	LONDON HEATHROW AIRPORT
PVG	SHANGHAI PUDONG INT'L AIRPORT
SIN	SINGAPORE CHANGI AIRPORT

EWR PEER AIRPORTS

IATA

CODE AIRPORT NAME

BOS	LOGAN INT'L AIRPORT
EWR	NEWARK LIBERTY INT'L AIRPORT
MSP	MINNEAPOLIS–SAINT PAUL INT'L AIRPORT
MUC	MUNICH AIRPORT
SEA	SEATTLE–TACOMA INT'L AIRPORT
YYZ	TORONTO PEARSON INT'L AIRPORT

LGA PEER AIRPORTS

IATA

CODE AIRPORT NAME

BOS	LOGAN INT'L AIRPORT
BWI	BALTIMORE–WASHINGTON INT'L AIRPORT
FLL	FORT LAUDERDALE–HOLLYWOOD INT'L AIRPORT
LGA	LAGUARDIA AIRPORT
MSP	MINNEAPOLIS–SAINT PAUL INT'L AIRPORT
PHL	PHILADELPHIA INT'L AIRPORT

“Who the Customer is”

- ➔ The demographic and airport passenger usage profiles of JFK, EWR and LGA generally align with what is seen in the Peer Panel groups. The significant exceptions are:
- fewer international passengers at JFK and LGA than their respective Peer Panel airports (the same goes for business passengers at JFK and EWR).
 - more check-in via Internet/phone for LGA, while the Peer Panel has more check-in via kiosk, main desk, and bag-drop only.
 - less rail, bus/shuttle usage among JFK passengers (bus also lower for EWR passengers) and more personal car and taxi/limo usage.
 - lower rental car usage at JFK and LGA.

“Who the Customer Is”

Q2 2018 Profile Comparison: PA Airport to Peer Panel

	JFK	Panel	EWR	Panel	LGA	Panel
Business	15%	22%	27%	32%	33%	30%
International	57%	66%	33%	27%	7%	14%
Connecting	28%	28%	28%	28%	11%	24%
Local O-D Pax. Dwell Time (mins.)	107.5	102.6	103.8	100.5	92.5	97.8
Women	55%	52%	54%	51%	51%	57%
Average Age	42	40	46	45	44	47
First/Business Class	8%	9%	11%	11%	14%	12%
Economy/Tourist Class	92%	91%	89%	89%	86%	88%
Check-in at Kiosk	28%	27%	36%	33%	23%	32%
Check-in Internet/Phone	29%	30%	37%	41%	49%	41%
Check-in at Main Desk	36%	39%	21%	23%	18%	21%
Check-in Curbside	2%	2%	2%	2%	2%	2%
Bag Drop Only	20%	19%	16%	19%	14%	18%
Avg. # of Return Trips (P12 Mos.)	4.6	5.4	5.9	5.7	7.1	5.7

Top Modes of Access: *

Personal Car	36%	26%	38%	35%	28%	39%
Rental Car	4%	8%	8%	9%	4%	10%
Taxi/Limo	33%	21%	22%	18%	44%	21%
Rail/Subway	10%	16%	8%	10%	1%	3%
Bus/Shuttle	7%	16%	10%	15%	10%	13%
Other (Uber/Lyft, etc.)	11%	13%	14%	13%	12%	15%

The Satisfaction Rating Attributes

Overall Satisfaction		
Access	Ground transportation:	Ground transportation to/from airport
	Parking:	Parking facilities
Access	VFM: Parking facilities:	Value for the money of parking facilities
	Baggage carts/trolleys:	Availability of baggage carts/trolleys
Check-in	Check-in waiting time:	Waiting time in check-in queue/line
	Efficiency of staff:	Efficiency of check-in staff
	Courtesy of check-in staff:	Courtesy and helpfulness of check-in staff
Security ID Check	Inspection waiting time:	Waiting time at passport/personal ID inspection
	Courtesy of inspection staff:	Courtesy and helpfulness of inspection staff
Security	Courtesy of security staff:	Courtesy and helpfulness of security staff
	Thoroughness:	Thoroughness of security inspection
	Security waiting time:	Waiting time at security inspection
	Safe/secure feeling:	Feeling of being safe and secure
Finding Way	Ease of finding way:	Ease of finding your way through airport
	Flight info screens:	Flight information screens
	Walking distance:	Walking distance inside the terminal
	Ease of connections:	Ease of making connections with other flights
Airport Facilities	Courtesy of airport staff:	Courtesy and helpfulness of airport staff (excluding check-in, passport control and security)
	Eating facilities:	Restaurant/Eating facilities
	VFM: Eating facilities:	Value for the money of restaurant/eating facilities
	Availability Bank/ATM/exchange:	Availability of bank/ATM facilities/money changers
	Shopping facilities:	Shopping facilities
	VFM: Shopping facilities:	Value for the money of shopping facilities
	Internet / Wi-Fi:	Internet access/Wi-Fi
	Business/Executives Lounges:	Business/Executive lounges
	Availability of washrooms:	Availability of washrooms/toilets
	Cleanliness of washrooms:	Cleanliness of washrooms/toilets
	Comfort of waiting/gate areas:	Comfort of waiting/gate areas
Airport Environment	Terminal cleanliness:	Cleanliness of airport terminal
	Airport Ambience:	Ambience of the airport
Arrivals Services	Passport inspection:	Passport/Personal ID inspection
	Baggage delivery speed:	Speed of baggage delivery service
	Customs inspection:	Customs inspection

5-Point Rating Scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent.



JFK Satisfaction Performance

JFK Airport Performance Trended

- ➔ **JFK enjoyed strong advances in Q2 2018 compared to the prior three waves, with significantly improved overall satisfaction among its passengers, including those traveling for business and leisure.**
- ➔ **These improvements extend to all airport elements within check-in, wayfinding, airport environment and arrivals services. JFK satisfaction also improved significantly on:**
 - ✓ Baggage carts,
 - ✓ Security ID check inspection time and wait time compared to Q3 and Q4 2017 (but remained stable relative to Q1),
 - ✓ Security staff courtesy (one of the two highest scoring items, 4.08) and wait time,
 - ✓ Eating facilities and their perceived value for the money (VFM) -- the lowest scoring item, 2.82,
 - ✓ Shopping facilities VFM,
 - ✓ Restroom availability and cleanliness, and
 - ✓ Gate area comfort.
- ➔ **Safe/secure feeling also tied for highest scoring airport element, 4.08.**

JFK Airport Performance Trended

		Q2 2018	Q1 2018	Q4 2017	Q3 2017
Overall Satisfaction	Overall Satisfaction	3.78	3.54 L	3.66 L	3.57 L
	Business	3.71	3.37 L	3.60	3.47 L
	Leisure	3.76	3.57 L	3.67	3.54 L
	Other*	3.92	3.61 L	3.68 L	3.71 L
	Leisure & Other	3.80	3.58 L	3.67 L	3.58 L
Access	Ground transportation	3.71	3.69	3.67	3.64
	Parking	3.67	3.61	3.75	3.62
	VFM: Parking facilities	2.93	2.94	3.26	3.01
	Baggage carts/trolleys	3.61	3.43 L	3.33 L	3.32 L
Check-in	Check-in waiting time	3.85	3.49 L	3.74	3.29 L
	Efficiency of staff	4.08	3.82 L	3.95 L	3.69 L
	Courtesy of check-in staff	4.05	3.66 L	3.92 L	3.69 L
Security ID Check	Inspection waiting time	3.87	3.80	3.44 L	3.27 L
	Courtesy of inspection staff	3.85	3.81	3.70 L	3.60 L
Security	Courtesy of security staff	3.75	3.32 L	3.59 L	3.59 L
	Thoroughness	3.95	3.88	3.89	3.72 L
	Security waiting time	3.65	2.75 L	2.94 L	3.05 L
	Safe/secure feeling	4.08	4.14	4.12	3.87 L
Finding Way	Ease of finding way	4.05	3.80 L	3.92 L	3.61 L
	Flight info screens	4.05	3.50 L	3.73 L	3.55 L
	Walking distance	3.70	2.88 L	3.14 L	3.18 L
	Ease of connections	3.65	2.06 L	2.27 L	2.56 L
Airport Facilities	Courtesy of airport staff	3.92	3.96	3.90	3.78 L
	Eating facilities	3.48	3.71 L	3.68 H	3.43
	VFM: Eating facilities	2.82	2.62 L	2.61 L	2.62 L
	Availability Bank/ATM/exchange	3.58	3.64	3.70	3.46
	Shopping facilities	3.58	3.48	3.55	3.48
	VFM: Shopping facilities	2.96	2.80 L	2.82 L	2.77 L
	Internet / Wi-Fi	3.23	2.75 L	2.75 L	2.48 L
	Business/Executives Lounges	3.51	3.47	3.52	3.34
	Availability of washrooms	3.95	3.53 L	3.84 L	3.53 L
	Cleanliness of washrooms	3.73	3.21 L	3.41 L	3.22 L
	Comfort of waiting/gate areas	3.70	3.33 L	3.45 L	3.39 L
Airport Environment	Terminal cleanliness	3.98	3.53 L	3.63 L	3.54 L
	Airport Ambience	3.76	3.64 L	3.74	3.53 L
Arrivals Services	Passport inspection	3.82	3.58 L	3.50 L	3.29 L
	Baggage delivery speed	3.69	3.52 L	3.58	3.40 L
	Customs inspection	3.72	3.48 L	3.52 L	3.31 L

Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit, Religious events, etc.
H/L Significantly Higher/Lower than Q2 2018.

JFK Airport Performance vs. Peer Panel

- ➔ **Despite improvement on many airport elements since Q1, JFK still significantly underperforms the peer airports panel overall and on nearly all airport elements, with nearly all items ranking last or next to last, except parking facilities, where JFK is comparable to AMS, LAX and LHR, but still significantly behind ICN, PVG and SIN. JFK's associated parking VFM outperforms AMS and matches LHR, but trails LAX, ICN, PVG and SIN, which accounts for its rise to the 5th place ranking in the panel.**
- ➔ **JFK outperforms AMS on walking distance (a significant improvement for JFK from Q1, but still trails behind the other Peer Airports) and remains at parity with the other wayfinding elements with both AMS and LAX.**
- ➔ **JFK performs on a par with AMS on satisfaction with restroom cleanliness and availability (also for LAX on availability). JFK is comparable to AMS and LAX on terminal cleanliness and ambiance. Satisfaction for all four of these airport elements improved significantly for JFK compared to Q1.**

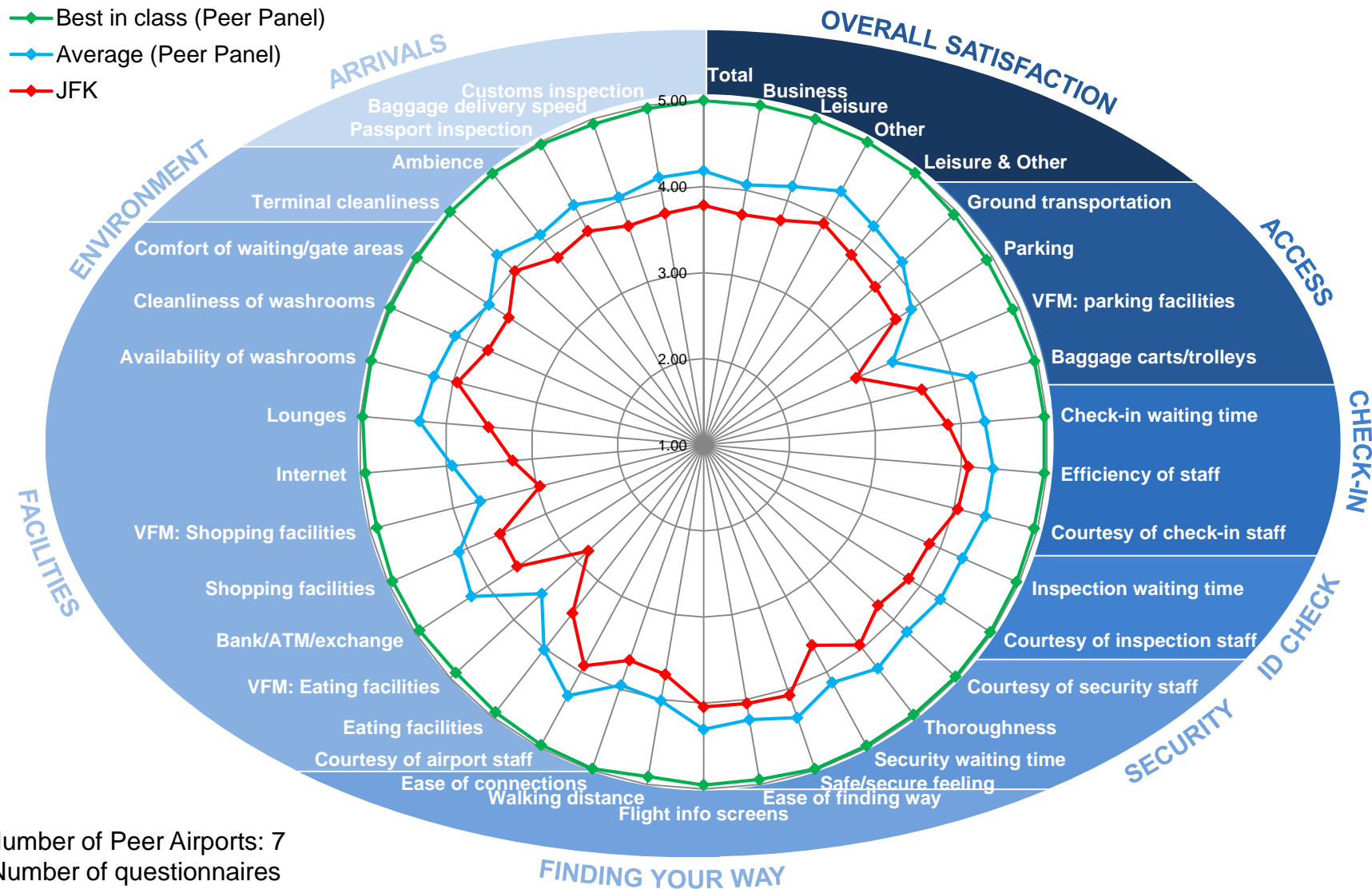
JFK Airport Performance vs. Peer Panel

			Panel	JFK Rank ~	AMS	LAX	LHR	ICN	PVG	SIN
Overall Satisfaction	Overall Satisfaction	3.78 H	4.18 ^	7	3.94	3.88 ^	4.15 ^	5.00 ^	5.00 ^	4.99 ^
	Business	3.71 H	4.06 ^	7	3.92 ^	3.73	4.08 ^	5.00 ^	4.99 ^	5.00 ^
	Leisure	3.76 H	4.17 ^	7	3.91 ^	3.89 ^	4.18 ^	5.00 ^	5.00 ^	4.99 ^
	Other*	3.92 H	4.35 ^	7	4.13	4.03	4.17 ^	5.00 ^	4.99 ^	4.99 ^
	Leisure & Other	3.80 H	4.22 ^	7	3.94 ^	3.92 ^	4.18 ^	5.00 ^	5.00 ^	4.99 ^
Access	Ground transportation	3.71	4.14 ^	7	4.07 ^	3.71	4.05 ^	4.90 ^	4.94 ^	4.95 ^
	Parking	3.67	3.88	5	3.35	3.48	3.85	4.76 ^	4.93 ^	4.92 ^
	VFM: Parking facilities	2.93	3.40 ^	5	2.46 v	3.23 ^	2.94	4.62 ^	4.89 ^	4.92 ^
	Baggage carts/trolleys	3.61 H	4.21 ^	7	3.97 ^	3.76 ^	4.05 ^	4.88 ^	4.93 ^	4.96 ^
Check-in	Check-in waiting time	3.85 H	4.28 ^	6	3.81	4.06 ^	4.27 ^	4.91 ^	4.90 ^	4.97 ^
	Efficiency of staff	4.08 H	4.37 ^	6	3.95	4.16	4.36 ^	4.96 ^	4.94 ^	4.97 ^
	Courtesy of check-in staff	4.05 H	4.37 ^	7	4.10	4.15 ^	4.37 ^	4.96 ^	4.95 ^	4.96 ^
Security ID Check	Inspection waiting time	3.87	4.28 ^	7	3.93	4.02 ^	4.27 ^	4.96 ^	4.94 ^	4.97 ^
	Courtesy of inspection staff	3.85	4.28 ^	7	4.08 ^	4.02 ^	4.26 ^	4.95 ^	4.95 ^	4.98 ^
Security	Courtesy of security staff	3.75 H	4.21 ^	7	4.07 ^	3.96 ^	4.12 ^	4.92 ^	4.94 ^	4.98 ^
	Thoroughness	3.95	4.29 ^	7	4.16 ^	4.06 ^	4.22 ^	4.95 ^	4.94 ^	4.97 ^
	Security waiting time	3.65 H	4.14 ^	7	3.96 ^	3.87 ^	4.07 ^	4.96 ^	4.92 ^	4.97 ^
	Safe/secure feeling	4.08	4.35 ^	7	4.21 ^	4.10	4.32 ^	4.97 ^	4.94 ^	4.98 ^
Finding Way	Ease of finding way	4.05 H	4.24 ^	5	4.02	3.99	4.17 ^	4.89 ^	4.94 ^	4.94 ^
	Flight info screens	4.05 H	4.31 ^	7	4.05	4.06	4.28 ^	4.94 ^	4.95 ^	4.95 ^
	Walking distance	3.70 H	4.01 ^	6	3.29 v	3.90 ^	3.80 ^	4.83 ^	4.91 ^	4.88 ^
	Ease of connections	3.65 H	3.95 ^	7	3.83	3.65	3.86 ^	4.86 ^	4.98 ^	4.97 ^
Airport Facilities	Courtesy of airport staff	3.92	4.31 ^	7	4.09 ^	4.07 ^	4.27 ^	4.97 ^	4.96 ^	4.96 ^
	Eating facilities	3.48 L	4.02 ^	7	3.77 ^	3.71 ^	3.92 ^	4.86 ^	4.94 ^	4.90 ^
	VFM: Eating facilities	2.82 H	3.55 ^	7	2.92	3.17 ^	3.37 ^	4.71 ^	4.91 ^	4.83 ^
	Availability Bank/ATM/exchange	3.58	4.22 ^	7	3.80 ^	3.83 ^	3.97 ^	4.94 ^	4.92 ^	4.94 ^
	Shopping facilities	3.58	4.10 ^	7	3.95 ^	3.69 ^	3.97 ^	4.93 ^	4.93 ^	4.94 ^
	VFM: Shopping facilities	2.96 H	3.67 ^	6	2.96	3.28 ^	3.30 ^	4.88 ^	4.91 ^	4.86 ^
	Internet / Wi-Fi	3.23 H	3.93 ^	7	3.75 ^	3.64 ^	3.70 ^	4.94 ^	4.88 ^	4.89 ^
	Business/Executives Lounges	3.51	4.31 ^	7	3.91 ^	3.84 ^	4.02 ^	4.97 ^	4.94 ^	4.96 ^
	Availability of washrooms	3.95 H	4.23 ^	6	3.91	3.99	4.15 ^	4.98 ^	4.94 ^	4.96 ^
	Cleanliness of washrooms	3.73 H	4.15 ^	7	3.80	3.86 ^	4.10 ^	4.97 ^	4.93 ^	4.96 ^
	Comfort of waiting/gate areas	3.70 H	3.97 ^	7	3.40 ^	3.73	3.78	4.98 ^	4.95 ^	4.95 ^
Airport Environment	Terminal cleanliness	3.98 H	4.26 ^	5	3.97	3.96	4.26 ^	5.00 ^	4.98 ^	4.99 ^
	Airport Ambience	3.76 H	4.09 ^	7	3.81	3.77	4.02 ^	4.99 ^	4.97 ^	4.99 ^
Arrivals Services	Passport inspection	3.82 H	4.17 ^	7	3.88	3.99 ^	3.94 ^	4.93 ^	4.94 ^	4.97 ^
	Baggage delivery speed	3.69 H	4.04 ^	6	3.49 ^	3.77	3.77	4.79 ^	4.94 ^	4.93 ^
	Customs inspection	3.72 H	4.15 ^	7	3.81	3.87 ^	3.92 ^	4.92 ^	4.95 ^	4.96 ^

Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit, Religious events, etc.

H/L Significantly Higher/Lower than 1st Qtr. 2018; ^ v Significantly Higher/Lower than JFK; ~ Rank in Peer Panel of 7 airports.

JFK – Performance vs. Peer Panel

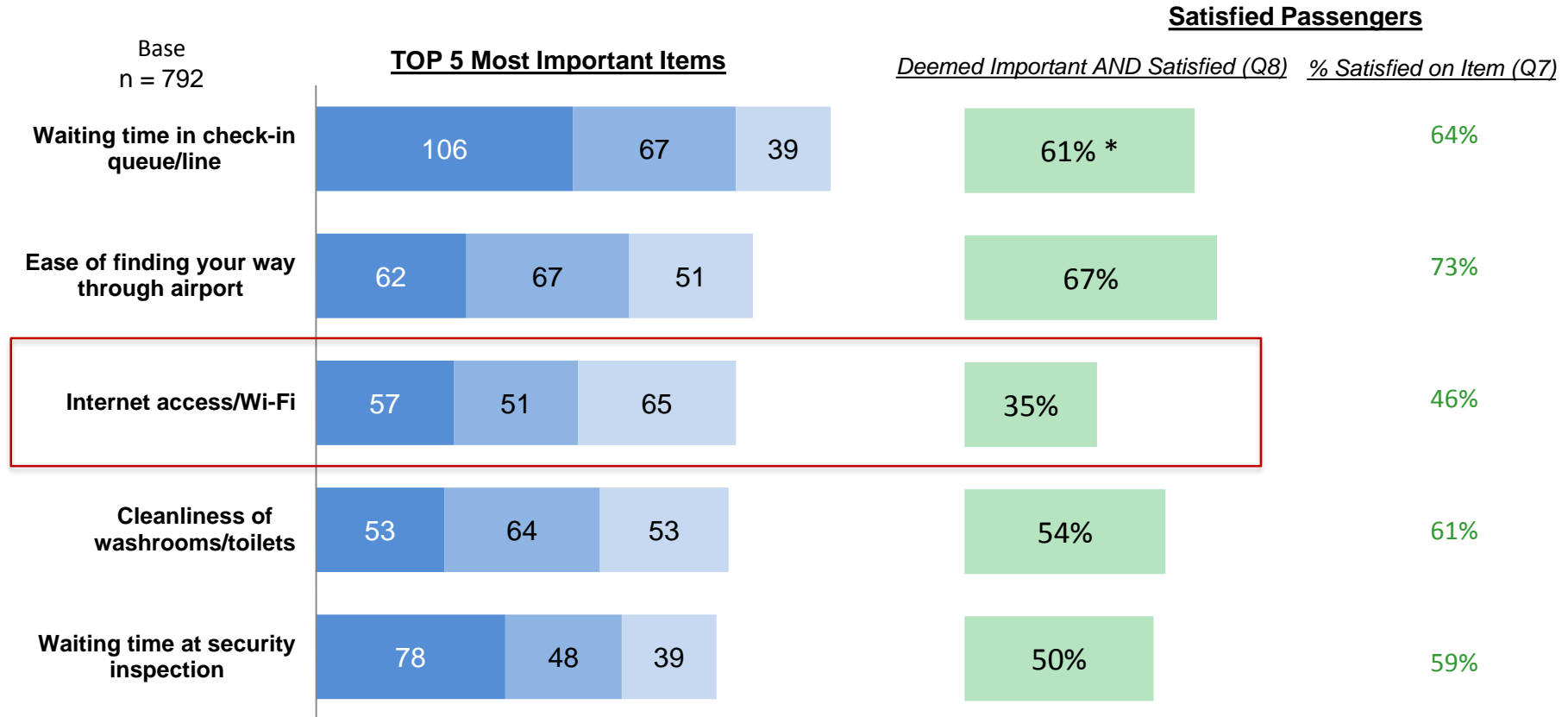


Number of Peer Airports: 7
Number of questionnaires
for JFK: n = 1,024

JFK– Airport Performance

Top 5 Most Important Items – Satisfied Passengers

- All five airport elements indicate a weakness for JFK (under 70% satisfaction for those who deem the item important), especially Internet access/WiFi.



■ 1st most important ■ 2nd most important ■ 3rd most important

Notes:

Top 5: from Q8: "Which of the items listed in Question 7 are the 1st / 2nd / 3rd most important to you at this airport?"

The figures represent the number of respondents who mention the item.

Satisfied Passengers are among the respondents who mention the item as important at Q8.

Satisfied Passengers among the respondents to Q7 items "Based on your experience today, please rate this airport on each service item".

Base is Respondents providing a valid response

* Scores 4 + 5
(Excellent+
Very Good)

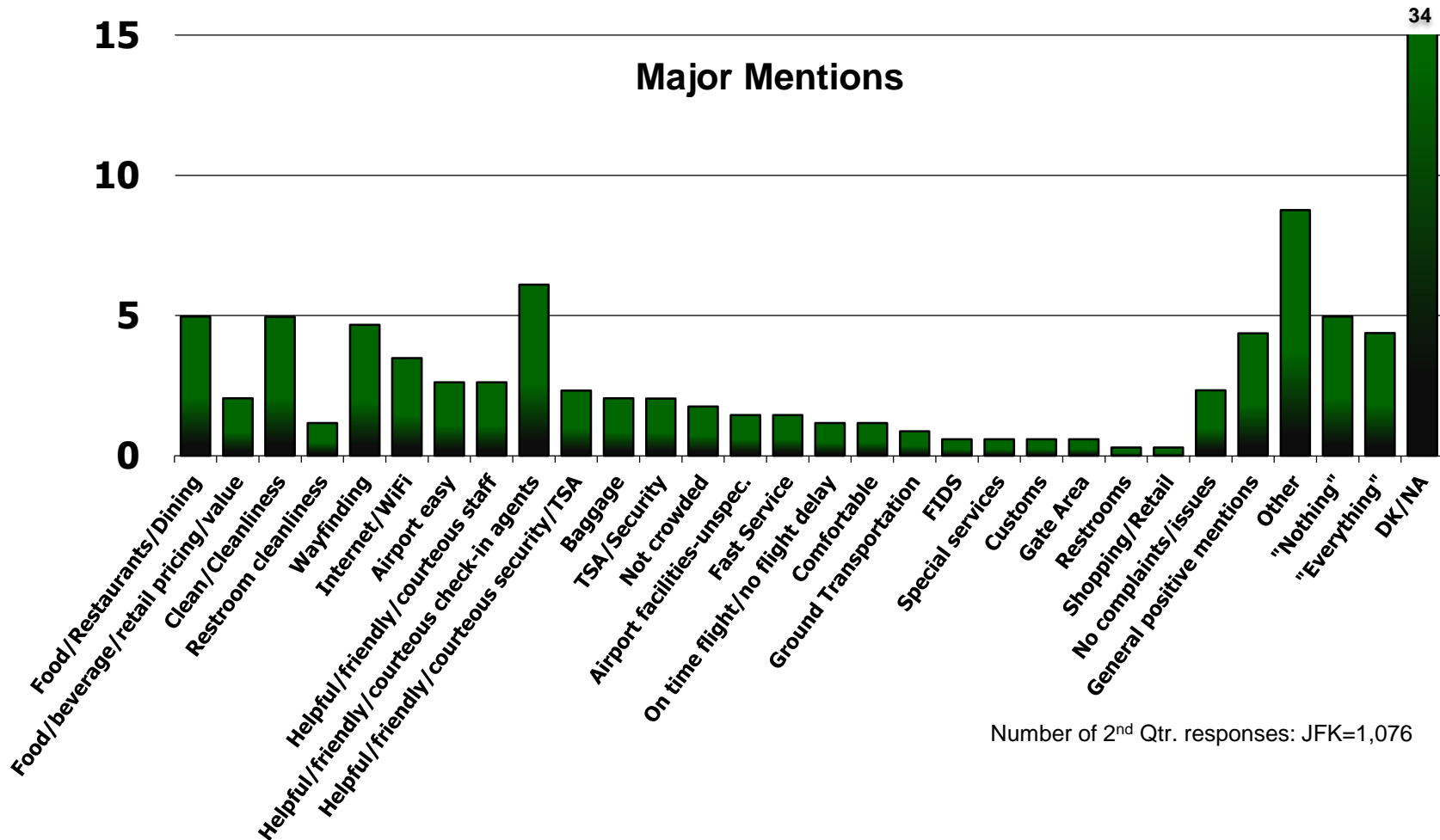


JFK Passenger Comments: Best/Worst Experience

Best Aspects of Airport Experience-JFK

% Total Responses – 2nd Qtr. 2018

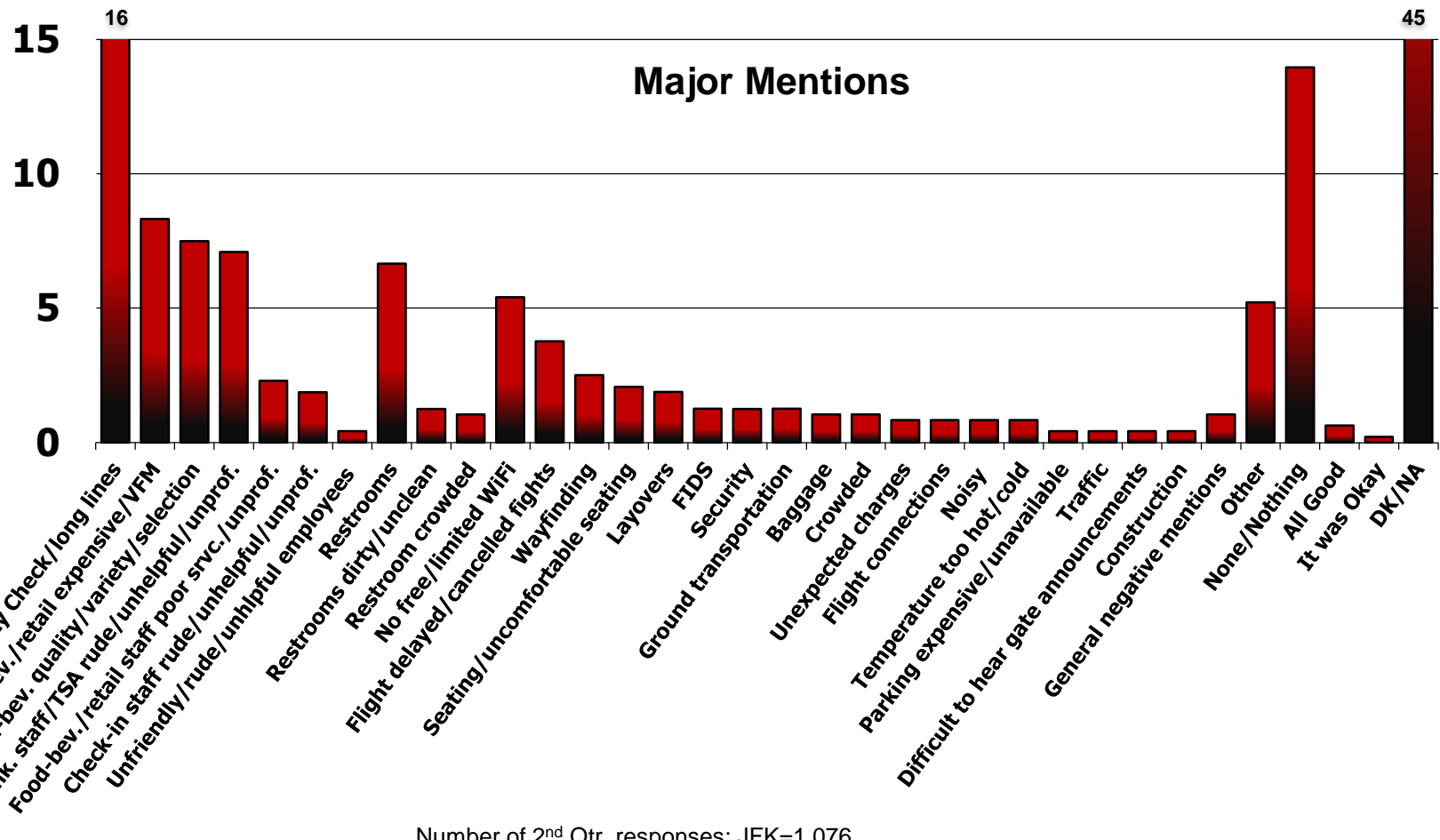
- Many JFK passengers didn't articulate what they liked best about their airport experience. Among the two-thirds who did, passengers focused primarily on the courtesy/helpfulness of the airport staff (especially Check-in agents), food-beverage selection and value, wayfinding and cleanliness.



Worst Aspects of Airport Experience-JFK

% Total Responses – 2nd Qtr. 2018

- Many JFK passengers didn't articulate what was their worst experience on-airport. A good-sized segment (13%) indicated there were no deficiencies. Negative comments focused heavily on the long lines/wait times at the Security Check and the staffing/TSA demeanor. Food-beverage quality/variety/selection as well as the respective staff demeanor followed close behind. Restrooms rose among the mentions, as did limited and no free WiFi and flight delays/cancellations.



Number of 2nd Qtr. responses: JFK=1,076



EWR Satisfaction Performance

EWR Airport Performance Trended

- ➔ **EWR passenger satisfaction has remained fairly consistent across the waves overall and for nearly all the airport elements. The exception where there was significant improvement occurs for Internet access/WiFi versus Q3 and Q4 (an advent of an increase to 45 minutes before having to re-log-in that can be repeated ad infinitum). Satisfaction with Security wait time improved slightly in Q1, reducing the trend in significant decline from Q3 and Q4.**

- ➔ **EWR experienced a significant decline in Q2 satisfaction with:**
 - ✓ Courtesy of TSA ID inspection agents, and
 - ✓ Arrivals CBP passport inspection agents

EWR Airport Performance Trended

		Q2 2018	Q1 2018	Q4 2017	Q3 2017
Overall Satisfaction	Overall Satisfaction	3.63	3.70	3.63	3.68
	Business	3.43	3.59	3.55	3.51
	Leisure	3.74	3.74	3.64	3.67
	Other*	3.57	3.73	3.73	3.90 H
	Leisure & Other	3.71	3.74	3.64	3.73
Access	Ground transportation	3.73	3.83	3.78	3.80
	Parking	3.45	3.46	3.49	3.61
	VFM: Parking facilities	2.94	2.95	3.05	3.19
	Baggage carts/trolleys	3.36	3.60	3.57	3.43
Check-in	Check-in waiting time	3.94	4.02	3.98	3.90
	Efficiency of staff	4.07	4.13	4.06	3.98
	Courtesy of check-in staff	3.95	4.07	3.99	4.01
Security ID Check	Inspection waiting time	3.85	3.88	3.93	3.95
	Courtesy of inspection staff	3.85	4.00 H	3.91	3.92
Security	Courtesy of security staff	3.72	3.85 H	3.82	3.78
	Thoroughness	3.88	3.95	3.94	3.94
	Security waiting time	3.57	3.69	3.74 H	3.74 H
	Safe/secure feeling	3.98	4.04	4.03	4.02
Finding Way	Ease of finding way	4.00	3.96	3.94	3.99
	Flight info screens	4.06	4.02	4.02	4.08
	Walking distance	3.76	3.76	3.78	3.81
	Ease of connections	3.58	3.64	3.66	3.70
Airport Facilities	Courtesy of airport staff	3.94	3.97	4.02	3.97
	Eating facilities	3.48	3.56	3.62	3.60
	VFM: Eating facilities	2.86	2.84	2.92	2.85
	Availability Bank/ATM/exchange	3.58	3.58	3.53	3.55
	Shopping facilities	3.41	3.36	3.46	3.48
	VFM: Shopping facilities	2.92	2.97	2.88	3.00
	Internet / Wi-Fi	3.28	3.11	2.89 L	2.81 L
	Business/Executives Lounges	3.26	3.42	3.45	3.48
	Availability of washrooms	3.66	3.73	3.58	3.71
	Cleanliness of washrooms	3.39	3.47	3.42	3.49
	Comfort of waiting/gate areas	3.53	3.57	3.57	3.58
Airport Environment	Terminal cleanliness	3.77	3.79	3.75	3.77
	Airport Ambience	3.54	3.56	3.51	3.56
Arrivals Services	Passport inspection	3.76	3.94 H	3.85	3.90
	Baggage delivery speed	3.53	3.63	3.59	3.65
	Customs inspection	3.64	3.81	3.69	3.75

Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit, Religious events, etc.

H/L Significantly Higher/Lower than Q2 2018.

EWR Airport Performance vs. Peer Panel

- ➔ **EWR also significantly underperforms the Peer Panel airports on overall satisfaction as well as nearly all airport elements, with most items ranking last or next to last.**
- ➔ **The exceptions occur for satisfaction with EWR parking where it's on a par with all the Peer airports and on EWR parking facilities value for the money (VFM), where it's significantly higher than BOS and on a par with MSP, SEA and YYZ (yet still underperforming MUC). EWR also outperforms MUC on walking distance.**
- ➔ **EWR does perform on a par with Peer airports on satisfaction with select airport elements:**
 - ✓ BOS: all three arrivals services elements.
 - ✓ MSP: walking distance.
 - ✓ MUC: ground transportation, check-in staff efficiency and wait time, wayfinding, FIDS, eating facilities VFM, available ATMs/money exchanges and arrivals baggage speed.
 - ✓ SEA: check-in wait time, security check wait time, available ATMs/money exchanges, gate comfort.

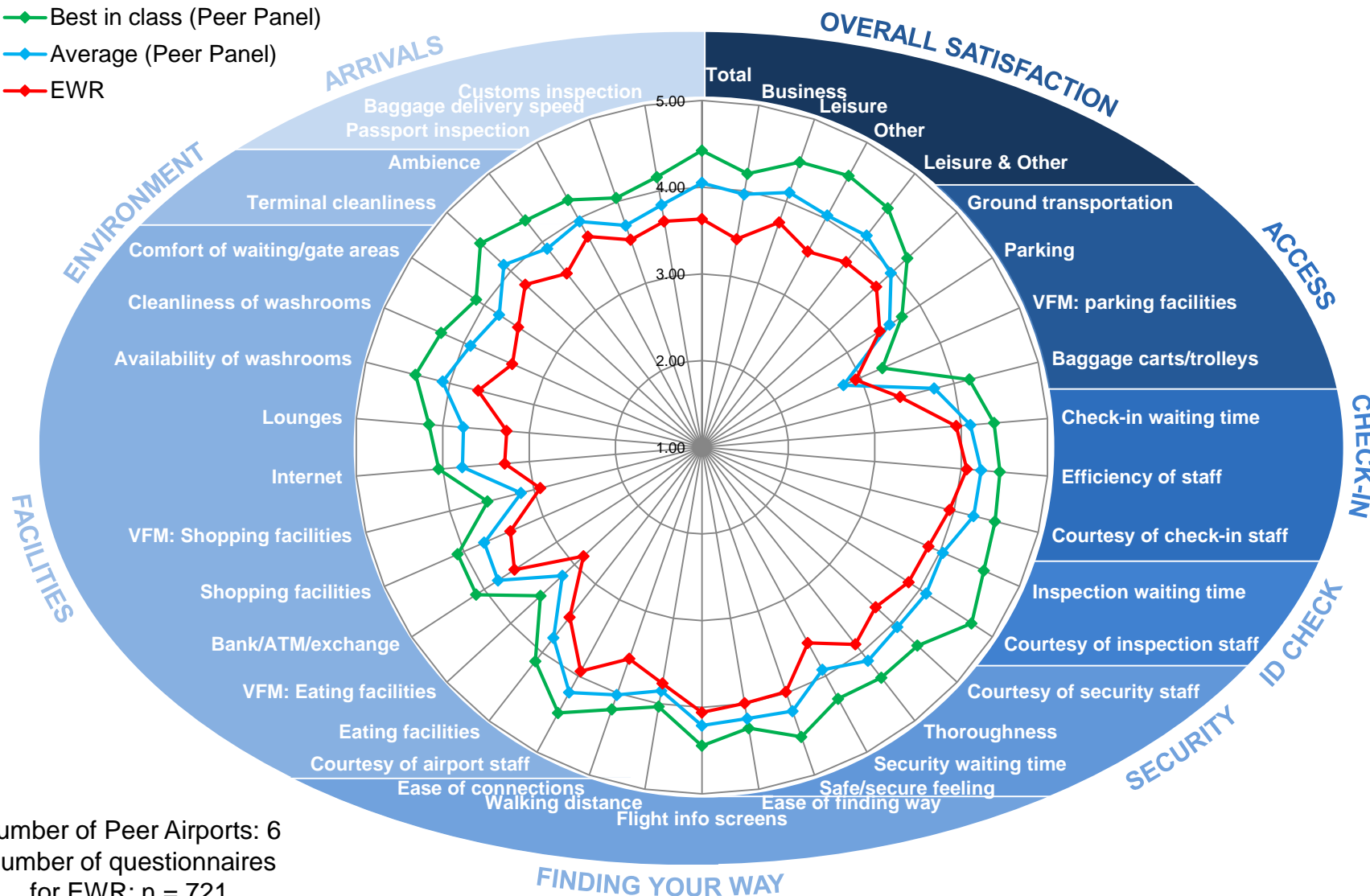
EWR Airport Performance vs. Peer Panel

			Panel	EWR Rank~	BOS	MSP	MUC	SEA	YYZ
Overall Satisfaction	Overall Satisfaction	3.63	4.05 ^	6	4.09 ^	4.31 ^	4.18 ^	3.97 ^	4.42 ^
	Business	3.43	3.96 ^	6	4.01 ^	4.19 ^	4.14 ^	3.88 ^	4.20 ^
	Leisure	3.74	4.11 ^	6	4.12 ^	4.37 ^	4.21 ^	4.05 ^	4.48 ^
	Other*	3.57	4.04 ^	6	4.19 ^	4.51 ^	4.30 ^	3.85 ^	4.56 ^
	Leisure & Other	3.71	4.09 ^	6	4.13 ^	4.39 ^	4.22 ^	4.01 ^	4.49 ^
Access	Ground transportation	3.73	3.96 ^	5	3.99 ^	4.13 ^	3.69	4.11 ^	4.22 ^
	Parking	3.45	3.59	5	3.43	3.73	3.55	3.72	3.76
	VFM: Parking facilities	2.94	2.78	4	2.53 v	2.90	2.49 ^	2.94	3.27
	Baggage carts/trolleys	3.36	3.76 ^	6	3.76 ^	3.76 ^	3.81 ^	3.75 ^	4.18 ^
Check-in	Check-in waiting time	3.94	4.11 ^	6	4.15 ^	4.28 ^	4.07	4.03	4.38 ^
	Efficiency of staff	4.07	4.23 ^	6	4.22 ^	4.45 ^	4.17	4.24 ^	4.44 ^
	Courtesy of check-in staff	3.95	4.23 ^	6	4.20 ^	4.42 ^	4.23 ^	4.29 ^	4.49 ^
Security ID Check	Inspection waiting time	3.85	4.03 ^	6	4.15 ^	4.55 T	4.14 ^	3.95	4.15 ^
	Courtesy of inspection staff	3.85 L	4.09 ^	6	4.11 ^	4.71 T	4.15 ^	4.16 ^	4.21 ^
Security	Courtesy of security staff	3.72 L	4.06 ^	6	4.07 ^	4.22 ^	4.12 ^	4.07 ^	4.38 ^
	Thoroughness	3.88	4.12 ^	6	4.13 ^	4.26 ^	4.18 ^	4.10 ^	4.37 ^
	Security waiting time	3.57	3.92 ^	6	4.01 ^	4.01 ^	4.05 ^	3.82 ^	4.30 ^
	Safe/secure feeling	3.98	4.22 ^	6	4.19 ^	4.33 ^	4.30 ^	4.20 ^	4.53 ^
Finding Way	Ease of finding way	4.00	4.17 ^	6	4.26 ^	4.28 ^	4.08	4.18 ^	4.29 ^
	Flight info screens	4.06	4.21 ^	6	4.22 ^	4.41 ^	4.13	4.21 ^	4.44 ^
	Walking distance	3.76	3.85	4	4.03 ^	3.73	3.61 v	3.87 ^	3.93 ^
	Ease of connections	3.58	4.02 ^	6	4.01 ^	4.00 ^	4.06 ^	4.15 ^	4.20 ^
Airport Facilities	Courtesy of airport staff	3.94	4.22 ^	6	4.24 ^	4.44 ^	4.14 ^	4.24 ^	4.49 ^
	Eating facilities	3.48	3.79 ^	6	3.79 ^	4.09 ^	3.83 ^	3.75 ^	4.13 ^
	VFM: Eating facilities	2.86	3.19 ^	6	3.37 ^	3.39 ^	2.90	3.18 ^	3.53 ^
	Availability Bank/ATM/exchange	3.58	3.81 ^	6	3.89 ^	4.04 ^	3.72	3.68	4.11 ^
	Shopping facilities	3.41	3.74 ^	6	3.64 ^	4.08 ^	3.88 ^	3.77 ^	3.92 ^
	VFM: Shopping facilities	2.92	3.15 ^	6	3.23 ^	3.29 ^	2.99	3.15 ^	3.55 ^
	Internet / Wi-Fi	3.28	3.77 ^	6	3.87 ^	3.98 ^	3.73 ^	3.82 ^	4.05 ^
	Business/Executives Lounges	3.26	3.76 ^	6	3.85 ^	3.87 ^	3.96 ^	3.72 ^	4.16 ^
	Availability of washrooms	3.66	4.08 ^	6	4.19 ^	4.35 ^	4.07 ^	4.05 ^	4.41 ^
	Cleanliness of washrooms	3.39	3.91 ^	6	3.98 ^	4.23 ^	4.17 ^	3.80 ^	4.28 ^
	Comfort of waiting/gate areas	3.53	3.79 ^	6	3.95 ^	4.03 ^	3.89 ^	3.59	4.11 ^
Airport Environment	Terminal cleanliness	3.77	4.11 ^	6	4.15 ^	4.36 ^	4.36 ^	3.94 ^	4.47 ^
	Airport Ambience	3.54	3.90 ^	6	3.93 ^	4.20 ^	4.13 ^	3.75 ^	4.32 ^
Arrivals Services	Passport inspection	3.76 L	3.96 ^	6	3.84	4.15 ^	4.03 ^	4.01 ^	4.24 ^
	Baggage delivery speed	3.53	3.71 ^	5	3.56	4.04 ^	3.53	3.87 ^	3.92 ^
	Customs inspection	3.64	3.83 ^	5	3.67	3.95 ^	3.95 ^	3.88 ^	4.16 ^

Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit, Religious events, etc.
T: Very small sample base; H /L Significantly Higher/Lower than 1st Qtr. 2018; ^ v Significantly Higher/Lower than EWR; ~ Rank in Peer Panel of 6 airports.

EWR – Performance vs. Peer Panel

- Best in class (Peer Panel)
- Average (Peer Panel)
- EWR

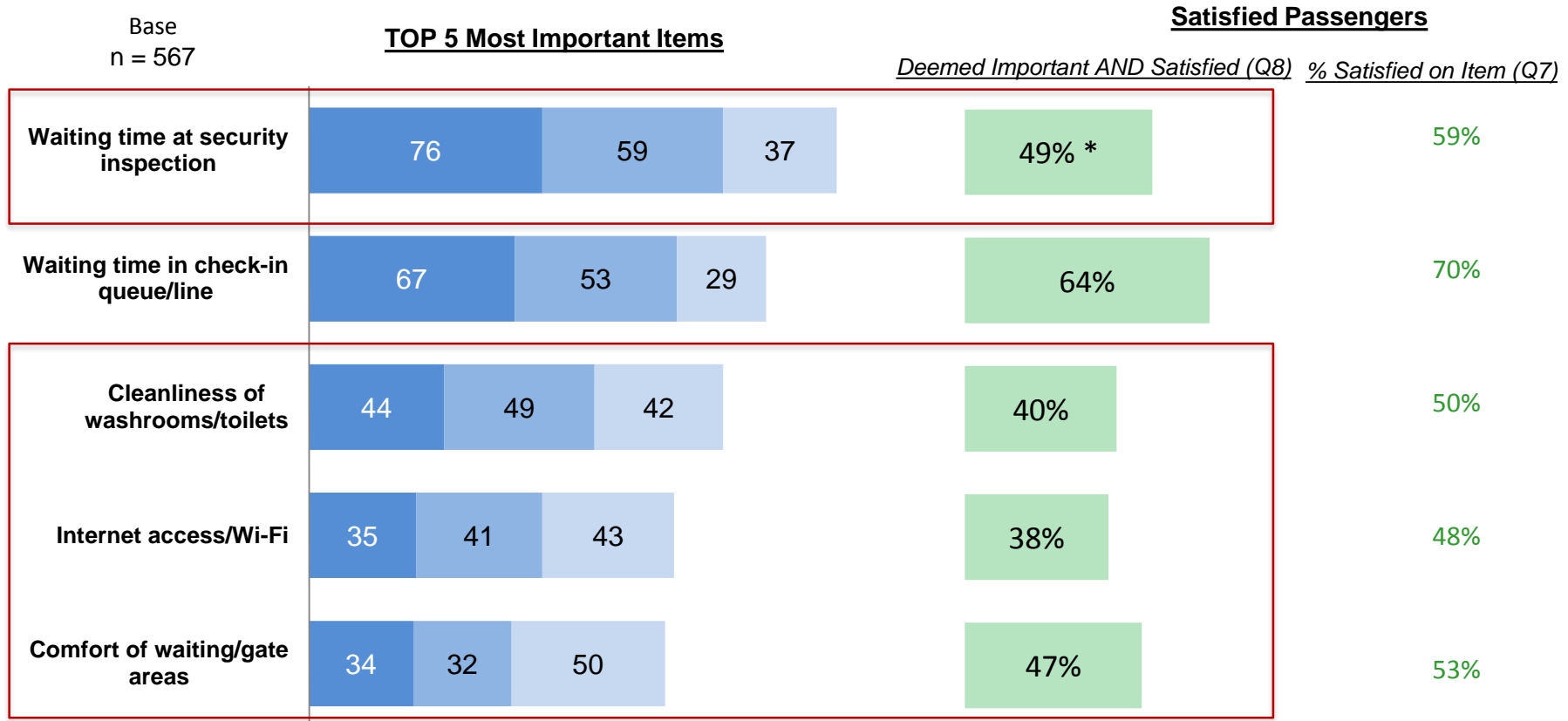


Number of Peer Airports: 6
 Number of questionnaires
 for EWR: n = 721

EWB– Airport Performance

Top 5 Most Important Items – Satisfied Passengers

- All five airport elements indicate a weakness for EWR (under 70% satisfaction for those who deem the item important), especially those under 50% satisfaction.



Notes: ■ 1st most important ■ 2nd most important ■ 3rd most important

Top 5: from Q8: "Which of the items listed in Question 7 are the 1st / 2nd / 3rd most important to you at this airport?"
The figures represent the number of respondents who mention the item.

Satisfied Passengers are among the respondents who mention the item as important at Q8.

Satisfied Passengers among the respondents to Q7 items "Based on your experience today, please rate this airport on each service item".

Base is Respondents providing a valid response

* Scores 4 + 5
(Excellent+
Very Good)

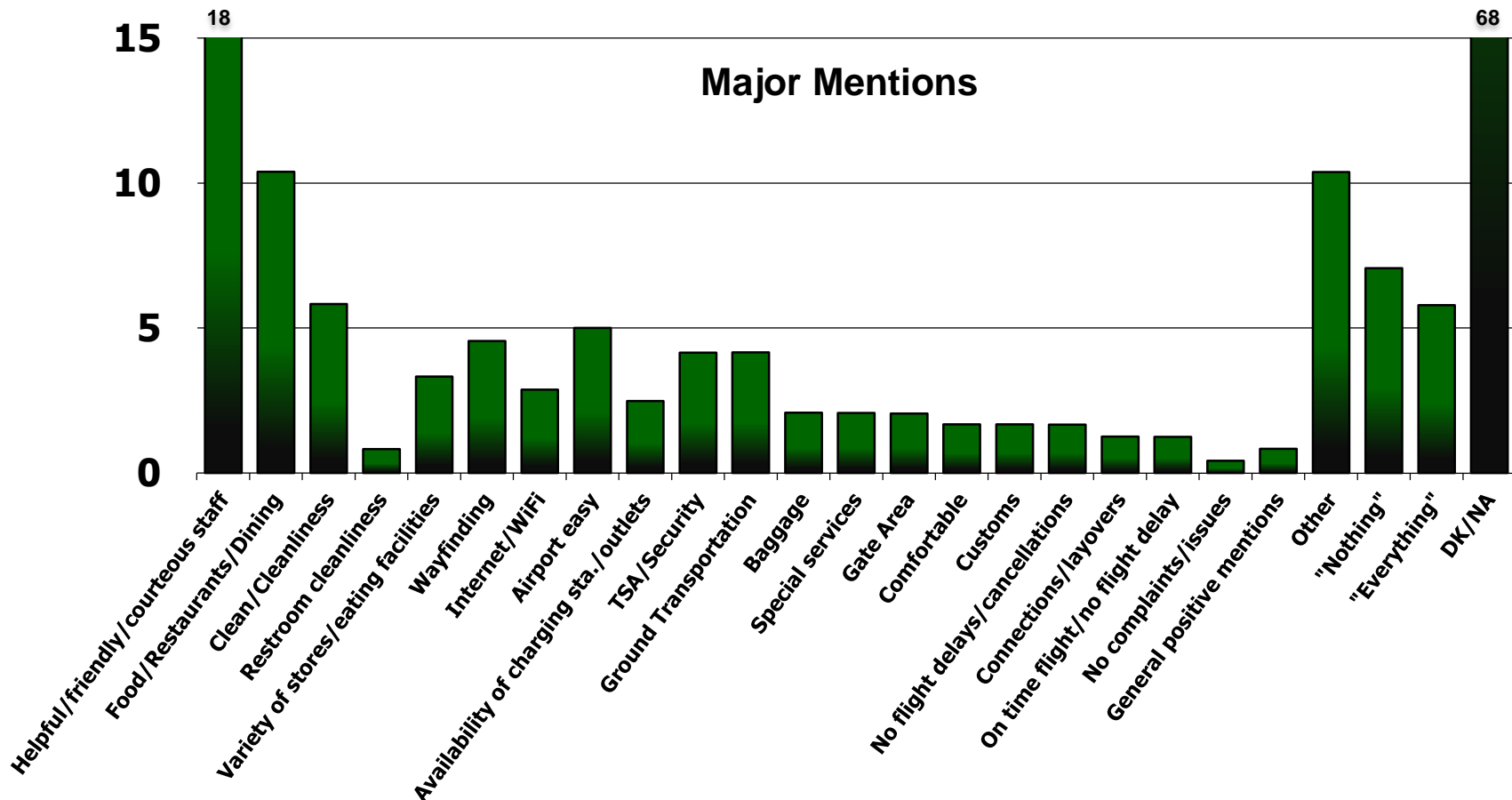


EWR Passenger Comments: Best/Worst Experience

Best Aspects of Airport Experience-EWR

% Total Responses – 2nd Qtr. 2018

- Many passengers didn't articulate what they liked best about their airport experience. Among the one-third who did, some EWR passengers said "everything" or "nothing," while others focused primarily on the courteous/friendly staff, the selection of food-beverage and dining venues, the cleanliness of the terminal, variety of store concepts, wayfinding, charging outlets, and ground transportation.



Number of 2nd Qtr. 2018 responses: EWR=755.

Worst Aspects of Airport Experience-EWR

% Total Responses – 2nd Qtr. 2018

- One-third of EWR passengers didn't articulate what was their worst experience on-airport. Among those who did, a small but significant segment of mentions (8%) indicated there were no deficiencies. Negative comments focused heavily on the long lines/wait times at the Security Checkpoint as well as the TSA demeanor, restrooms (especially cleanliness and overcrowding), flight delays/cancellations, and food-beverage quality/variety/selection, including pricing. To a lesser extent, passengers cited limited Internet access and no free WiFi.

15

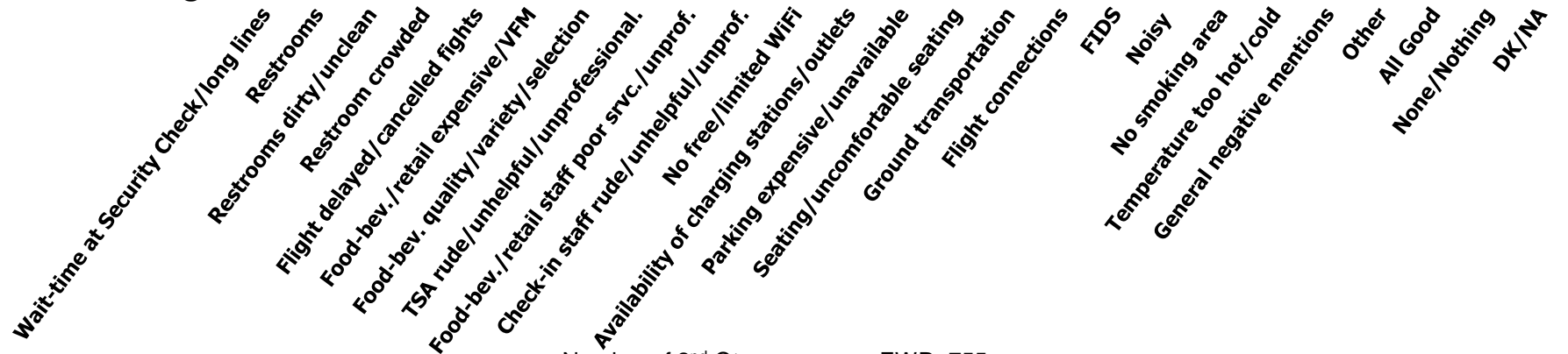
Major Mentions

10

5

0

33



Number of 2nd Qtr. responses: EWR=755



LGA Satisfaction Performance

LGA Airport Performance Trended

- ➔ **LGA's strong performance in Q1 receded a bit in Q2. There was no significant improvement in satisfaction overall or on any of the airport elements. Passenger satisfaction declined significantly overall and on the following airport elements:**
 - ✓ Ground transportation
 - ✓ All three Check-in elements
 - ✓ Security Check ID inspection and personal Security Check wait time
 - ✓ Eating facilities and their respective value for the money (VFM) –the latter is the lowest scoring airport element (2.67).
 - ✓ Shopping facilities and their respective (VFM)
 - ✓ Terminal ambiance

- ➔ **Check-in staff efficiency scored the highest in satisfaction (4.19)**

LGA Airport Performance Trended

		Q2 2018	Q1 2018	Q4 2017	Q3 2017
Overall Satisfaction	Overall Satisfaction	3.48	3.65 H	3.40	3.37 L
	Business	3.24	3.50 H	3.22	3.25
	Leisure	3.58	3.69	3.49	3.40 L
	Other*	3.74	3.80	3.58	3.54
	Leisure & Other	3.61	3.71	3.49	3.42 L
Access	Ground transportation	3.38	3.59 H	3.21 L	3.30
	Parking	3.00	3.12	2.52	2.48 L
	VFM: Parking facilities	2.83	2.71	2.43	2.50
	Baggage carts/trolleys	3.47	3.61	3.25	3.18 L
Check-in	Check-in waiting time	4.13	4.34 H	4.05	3.96 L
	Efficiency of staff	4.19	4.32 H	4.08 L	4.02 L
	Courtesy of check-in staff	4.10	4.22 H	3.99	3.96 L
Security ID Check	Inspection waiting time	4.04	4.30 H	3.98	4.04
	Courtesy of inspection staff	4.05	4.14	3.91 L	3.96
Security	Courtesy of security staff	3.93	4.02	3.81 L	3.88
	Thoroughness	4.07	4.15	3.95 L	3.96 L
	Security waiting time	3.92	4.17 H	3.82	3.97
	Safe/secure feeling	4.13	4.22	3.98 L	4.03 L
Finding Way	Ease of finding way	3.93	4.02	3.88	3.87
	Flight info screens	3.97	4.05	3.89	3.84 L
	Walking distance	3.98	4.06	3.96	3.95
	Ease of connections	3.99	4.10	3.93	3.56 L
Airport Facilities	Courtesy of airport staff	4.02	4.13	3.94	3.90 L
	Eating facilities	3.20	3.45 H	3.24	3.22
	VFM: Eating facilities	2.67	2.90 H	2.79	2.72
	Availability Bank/ATM/exchange	3.41	3.61	3.28	3.31
	Shopping facilities	2.95	3.30 H	2.94	2.94
	VFM: Shopping facilities	2.70	2.97 H	2.71	2.73
	Internet / Wi-Fi	3.43	3.28	2.74 L	2.67 L
	Business/Executives Lounges	3.31	3.43	3.24	3.07
	Availability of washrooms	3.62	3.70	3.53	3.52
	Cleanliness of washrooms	3.52	3.51	3.34 L	3.26 L
	Comfort of waiting/gate areas	3.30	3.42	3.25	3.18 L
Airport Environment	Terminal cleanliness	3.58	3.66	3.44 L	3.41 L
	Airport Ambience	3.16	3.36 H	3.06	3.08
Arrivals Services	Passport inspection	NA	NA	NA	NA
	Baggage delivery speed	3.80	3.77	3.65	3.50 L
	Customs inspection	NA	NA	NA	NA

Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit, Religious events, etc.

NA: Not applicable; H/L Significantly Higher/Lower than Q2 2018.

LGA Airport Performance vs. Peer Panel

- ➔ **LGA lost ground in Q2, receding from the moderate gains made against the Peer Panel last quarter. LGA significantly underperforms the Peer Panel airports on satisfaction overall and on most airport elements, with most items ranking last or next to last.**

- ➔ **The exceptions to this where LGA is comparable, are as follows:**
 - ✓ Check-in wait time and staff efficiency vs. BOS, FLL and BWI (only on wait time).
 - ✓ Parking facilities VFM vs. all Peer Airports except BWI (which leads significantly).
 - ✓ Security Check ID inspection and TSA wait time for BOS and MSP.
 - ✓ Security personal inspection for BOS, BWI and MSP and thoroughness of the process (for BOS).
 - ✓ Walking distance and ease of connections for BOS, FLL, MSP and PHL (BWI leads significantly).
 - ✓ Internet access/WiFi for BWI.
 - ✓ ATMs/money exchanges for FLL.
 - ✓ Business-class lounges for FLL
 - ✓ Arrivals baggage delivery speed for all but BOS (significantly lower) and MSP (significantly higher).

LGA Airport Performance vs. Peer Panel

			LGA							Air
			Panel	Rank ~	BOS	BWI	FLL	MSP	PHL	
Overall Satisfaction	Overall Satisfaction	<div><div></div></div> 3.48 L	4.02 ^	6	4.09 ^	4.22 ^	3.99 ^	4.31 ^	4.03 ^	
	Business	<div><div></div></div> 3.24 L	3.88 ^	6	4.01 ^	4.01 ^	3.87 ^	4.19 ^	3.92 ^	
	Leisure	<div><div></div></div> 3.58	4.08 ^	6	4.12 ^	4.33 ^	4.07 ^	4.37 ^	4.08 ^	
	Other*	<div><div></div></div> 3.74	4.06 ^	6	4.19 ^	4.17 ^	3.81	4.51 ^	4.03 ^	
	Leisure & Other	<div><div></div></div> 3.61	4.08 ^	6	4.13 ^	4.30 ^	4.01 ^	4.39 ^	4.07 ^	
Access	Ground transportation	<div><div></div></div> 3.38 L	3.89 ^	6	3.99 ^	4.18 ^	3.90 ^	4.13 ^	3.96 ^	
	Parking	<div><div></div></div> 3.00	3.67 ^	6	3.43	4.15 ^	3.73 ^	3.73 ^	3.60 ^	
	VFM: Parking facilities	<div><div></div></div> 2.83	3.15	6	2.53	3.79 ^	3.25	2.90	3.18	
	Baggage carts/trolleys	<div><div></div></div> 3.47	3.78 ^	6	3.76 ^	4.01 ^	3.86 ^	3.76	3.80 ^	
Check-in	Check-in waiting time	<div><div></div></div> 4.13 L	4.19	5	4.15	4.19	4.11	4.28 ^	4.26 ^	
	Efficiency of staff	<div><div></div></div> 4.19 L	4.28	6	4.22	4.32 ^	4.25	4.45 ^	4.33 ^	
	Courtesy of check-in staff	<div><div></div></div> 4.10 L	4.23 ^	6	4.20	4.32 ^	4.18	4.42 ^	4.25 ^	
Security ID Check	Inspection waiting time	<div><div></div></div> 4.04 L	4.17	6	4.15	4.19 ^	4.16 T	4.55	4.26 ^	
	Courtesy of inspection staff	<div><div></div></div> 4.05	4.14 ^	6	4.11	4.19 ^	4.14 T	4.71	4.18 ^	
Security	Courtesy of security staff	<div><div></div></div> 3.93	4.08 ^	6	4.07 ^	4.07 ^	4.18 ^	4.22 ^	4.12 ^	
	Thoroughness	<div><div></div></div> 4.07	4.16 ^	6	4.13	4.19 ^	4.24 ^	4.26 ^	4.18 ^	
	Security waiting time	<div><div></div></div> 3.92 L	4.04 ^	6	4.01	4.01	4.15 ^	4.01	4.14 ^	
	Safe/secure feeling	<div><div></div></div> 4.13	4.24 ^	6	4.19	4.26 ^	4.30 ^	4.33 ^	4.28 ^	
Finding Way	Ease of finding way	<div><div></div></div> 3.93	4.23 ^	6	4.26 ^	4.42 ^	4.16 ^	4.28 ^	4.27 ^	
	Flight info screens	<div><div></div></div> 3.97	4.24 ^	6	4.22 ^	4.37 ^	4.12 ^	4.41 ^	4.33 ^	
	Walking distance	<div><div></div></div> 3.98	3.97	4	4.03	4.08	3.99	3.73 v	3.91	
	Ease of connections	<div><div></div></div> 3.99	4.05	4	4.01	4.31 ^	3.92	4.00	3.97	
Airport Facilities	Courtesy of airport staff	<div><div></div></div> 4.02	4.23 ^	6	4.24 ^	4.36 ^	4.17 ^	4.44 ^	4.22 ^	
	Eating facilities	<div><div></div></div> 3.20 L	3.80 ^	6	3.79 ^	4.06 ^	3.54 ^	4.09 ^	3.98 ^	
	VFM: Eating facilities	<div><div></div></div> 2.67 L	3.30 ^	6	3.37 ^	3.63 ^	3.19 ^	3.39 ^	3.38 ^	
	Availability Bank/ATM/exchange	<div><div></div></div> 3.41	3.85 ^	6	3.89 ^	3.88 ^	3.54	4.04 ^	4.06 ^	
	Shopping facilities	<div><div></div></div> 2.95 L	3.71 ^	6	3.64 ^	3.92 ^	3.46 ^	4.08 ^	4.01 ^	
	VFM: Shopping facilities	<div><div></div></div> 2.70 L	3.21 ^	6	3.23 ^	3.35 ^	2.99 ^	3.29 ^	3.40 ^	
	Internet / Wi-Fi	<div><div></div></div> 3.43	3.71 ^	6	3.87 ^	3.53	3.70 ^	3.98 ^	3.71 ^	
	Business/Executives Lounges	<div><div></div></div> 3.31	3.78 ^	6	3.85 ^	3.85 ^	3.40	3.87 ^	4.07 ^	
	Availability of washrooms	<div><div></div></div> 3.62	4.08 ^	6	4.19 ^	4.17 ^	3.92 ^	4.35 ^	4.13 ^	
	Cleanliness of washrooms	<div><div></div></div> 3.52	3.86 ^	6	3.98 ^	3.99 ^	3.87 ^	4.23 ^	3.72 ^	
	Comfort of waiting/gate areas	<div><div></div></div> 3.30	3.81 ^	6	3.95 ^	3.94 ^	3.76 ^	4.03 ^	3.81 ^	
Airport Environment	Terminal cleanliness	<div><div></div></div> 3.58	4.05 ^	6	4.15 ^	4.26 ^	4.06 ^	4.36 ^	3.98 ^	
	Airport Ambience	<div><div></div></div> 3.16 L	3.84 ^	6	3.93 ^	4.06 ^	3.87 ^	4.20 ^	3.87 ^	
Arrivals Services	Passport inspection	NA	4.04	NA	3.84	4.20	4.19	4.15	4.12	
	Baggage delivery speed	<div><div></div></div> 3.80	3.70	3	3.56 v	3.71	3.89	4.04 ^	3.65	
	Customs inspection	NA	3.84	NA	3.67	4.02	3.99	3.95	3.94	

Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit ,Religious events, etc.

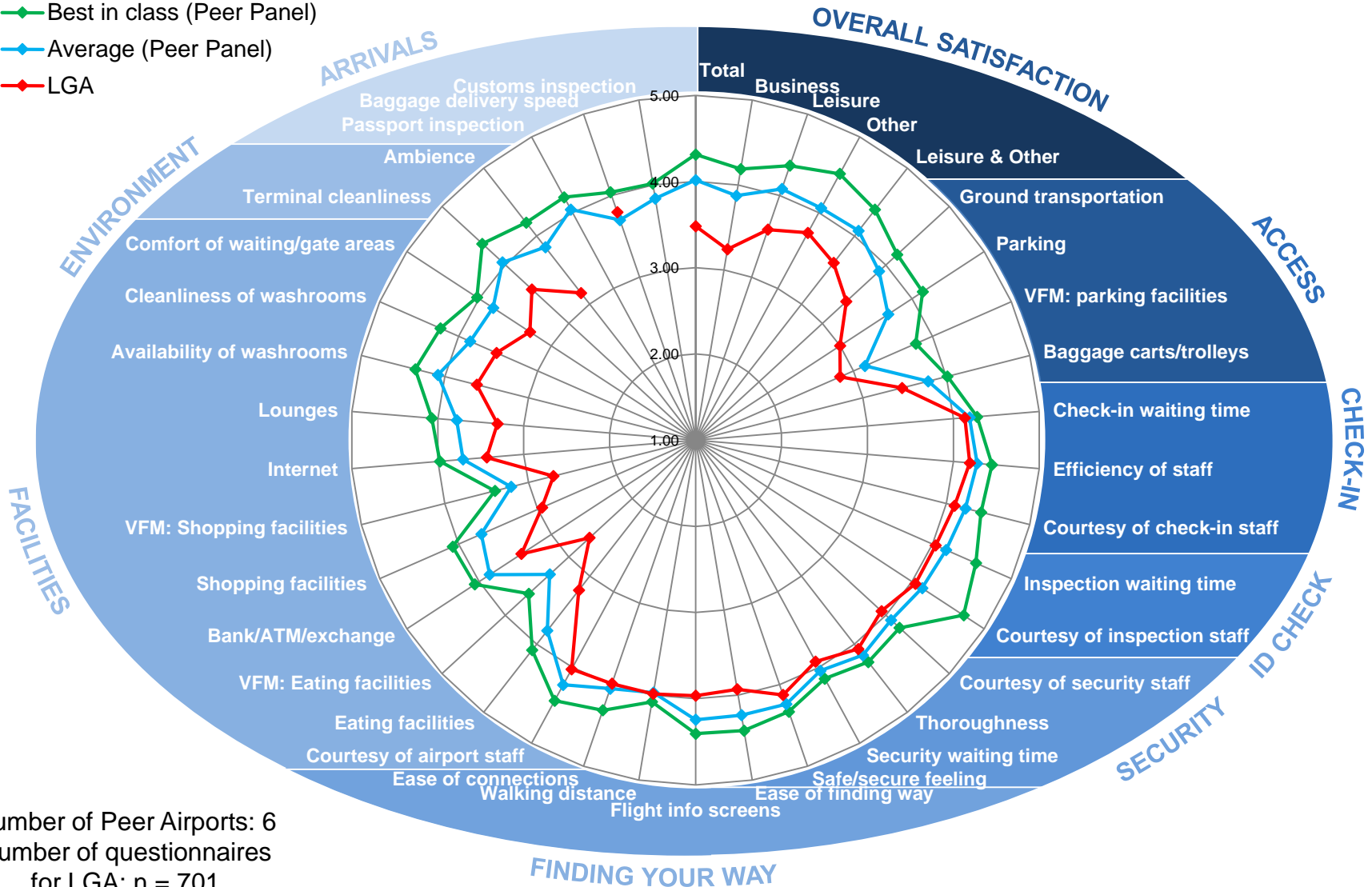
NA: Not applicable; H /L Significantly Higher/Lower than 1st Qtr. 2018; ^ v Significantly Higher/Lower than LGA; Significantly higher. ~ Rank in Peer Panel of 6 airports.

T: Very small sample base;

LGA – Performance vs. Customized Panel

Total Traffic

- Best in class (Peer Panel)
- Average (Peer Panel)
- LGA

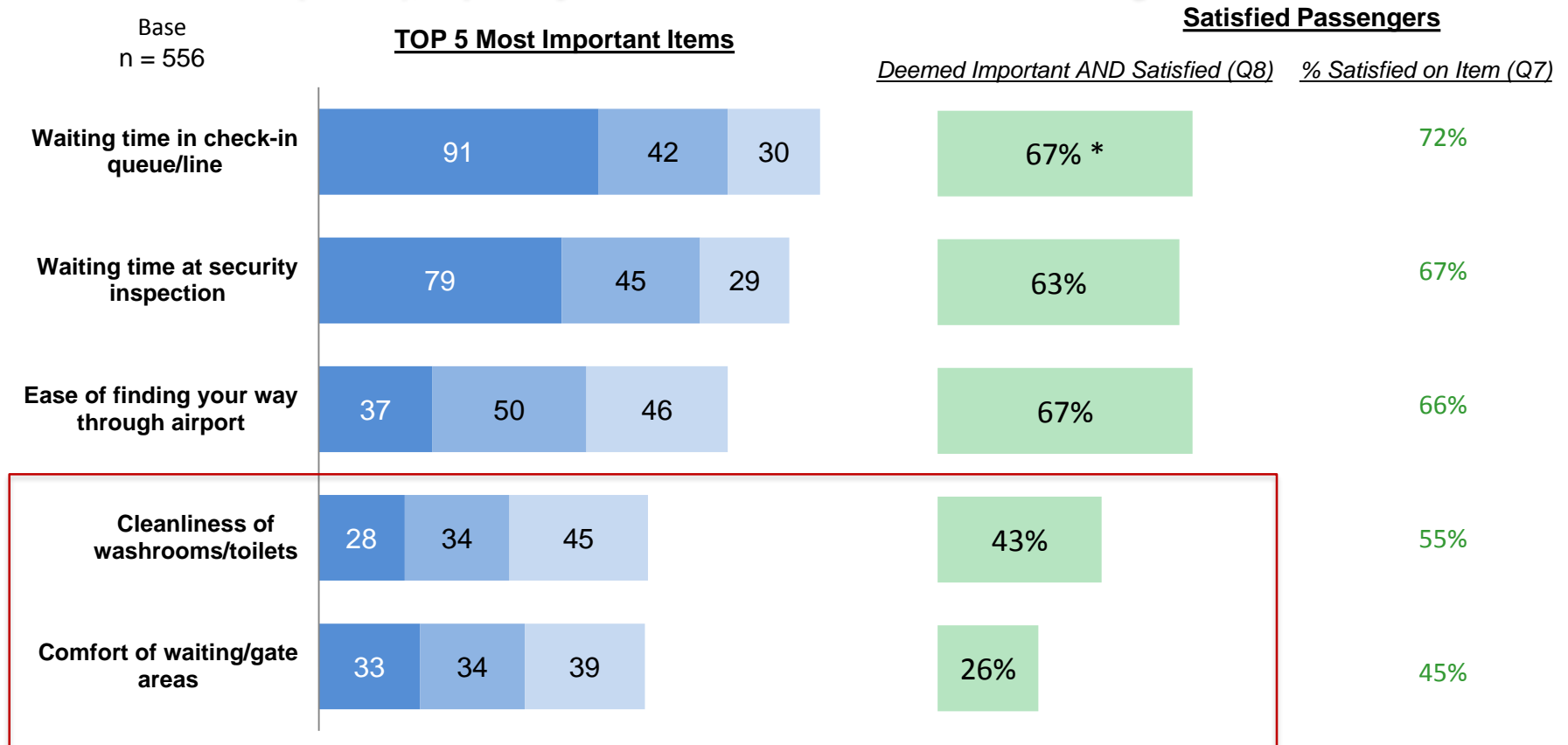


Number of Peer Airports: 6
 Number of questionnaires
 for LGA: n = 701

LGA– Airport Performance

Top 5 Most Important Items – Satisfied Passengers

- All five airport elements indicate a weakness for LGA (under 70% satisfaction for those who deem the item important), especially restroom cleanliness and comfortable gate area.



Notes: ■ 1st most important ■ 2nd most important ■ 3rd most important

Top 5: from Q8: "Which of the items listed in Question 7 are the 1st / 2nd / 3rd most important to you at this airport?"
The figures represent the number of respondents who mention the item.

Satisfied Passengers are among the respondents who mention the item as important at Q8.

Satisfied Passengers among the respondents to Q7 items "Based on your experience today, please rate this airport on each service item".

Base is Respondents providing a valid response

* Scores 4 + 5
(Excellent+
Very Good)

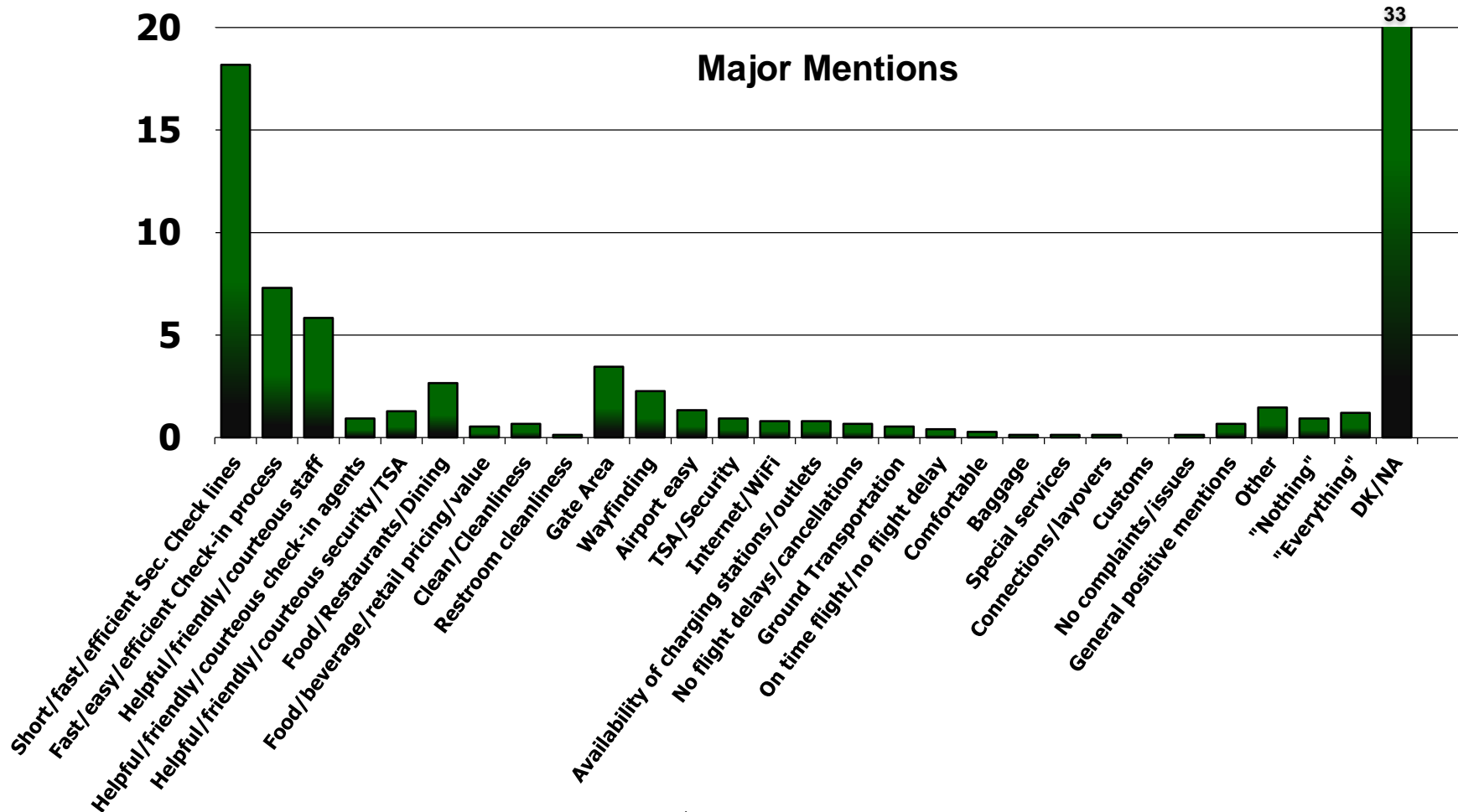


LGA Passenger Comments: Best/Worst Experience

Best Aspects of Airport Experience-LGA

% Total Responses – 2nd Qtr. 2018

- Many LGA passengers (33%) didn't articulate what they liked best about their airport experience. Among the two-thirds who did, LGA passengers focused primarily on the efficiency of the Security Check process, the check-in process and the helpful/courteous airport staff. Gate area experience and wayfinding also contributed.

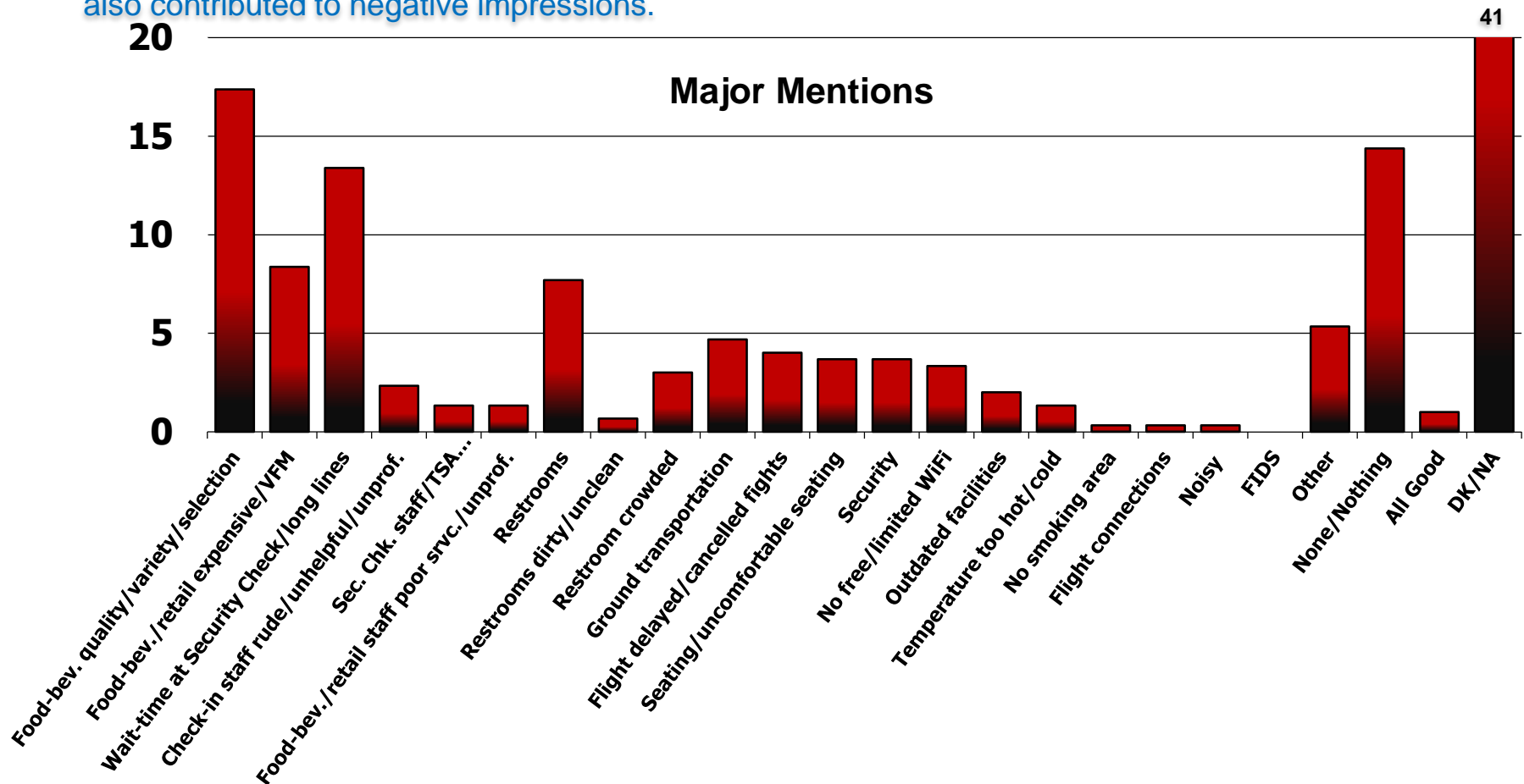


Number of 2nd Qtr. responses: LGA=723

Worst Aspects of Airport Experience-LGA

% Total Responses – 2nd Qtr. 2018

- Many LGA passengers (41%) didn't articulate what was their worst experience on-airport. Among those who did, a small set of mentions (14%) suggested there were no deficiencies. Negative comments center on food-beverage quality/variety/selection, and the price of these goods. Passengers also mentioned wait times/long lines at the Security checkpoint. Restrooms stood out as well among the commentary, especially crowded ones. Ground transportation issues and flight delays also contributed to negative impressions.



Number of 2nd Qtr. responses: LGA =726



Terminal-level Satisfaction Performance

JFK Terminal Performance

- ➔ **Terminals 1:** Overall satisfaction remained steady in Q2 2018. Satisfaction with most terminal elements remained stable, while satisfaction improved significantly for security wait-time (3.32), FIDS (3.79), restroom availability (3.70) and cleanliness (3.37) and Arrivals passport inspection 3.72). T1 safe/secure feeling (3.77) declined significantly, as did eating places (2.82).
 - ✓ Staff efficiency and courtesy both received the highest satisfaction score (4.06); eating facilities VFM(2.46) received the lowest score.

- ➔ **Terminal 2:** Satisfaction remained stable overall, while improving significantly across many terminal elements: all check-in elements, security check wait time (3.98) and TSA courtesy (3.96), FIDS (3.69) and walking distance (3.74), Internet access/WiFi (3.60), restroom availability (3.68) and comfort of gate (3.65). Safe/secure feeling (at the Security Check – 4.28, was the highest scoring element; shopping facilities VFM (2.84), the lowest scoring element.

- ➔ **Terminal 4:** Satisfaction increased significantly overall and for most terminal elements, with the exception of the following elements that score comparably Q1: all airport access elements (excluding baggage carts); security ID check elements; thoroughness of the security check process; easy of finding way; ease of connections; airport staff courtesy; availability of ATMs/ money exchanges; and business lounges. Eating facilities and safe/ secure feeling declined significantly in Q2 – though it was the highest scoring element. Eating facilities VFM was the lowest scoring element.

JFK Terminal Performance

- ➔ **Terminal 5:** Satisfaction remained stable overall and on most terminal elements, while it improved significantly on security wait time (3.85) and ease of connections (3.83). It declined significantly on airport staff courtesy (4.04) and eating facilities (3.77). It scored highest on FIDS (4.29) and lowest on parking facilities VFM (2.54).

- ➔ **Terminal 7:** Satisfaction remained stable overall and on many terminal elements, while it improved significantly in satisfaction with all check-in elements (check-in staff efficiency - 4.16, was the highest scoring element), security wait time (3.59), walking distance (3.78) and Internet access/WiFi (3.16). Satisfaction declined significantly on eating facilities (2.84). Eating facilities VFM (2.39) was the lowest scoring element.

- ➔ **Terminal 8:** Satisfaction improved significantly overall and on nearly all terminal elements, excluding the following where it was comparable in Q2: all airport access elements, TSA ID ticket checker courtesy, safe/secure feeling, airport staff courtesy, eating facilities, availability of ATMs/money exchanges, business lounges and arrival baggage speed. It scored highest on FIDS (4.27) and lowest on eating facilities VFM (3.08).

JFK Terminal Performance



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JFK Terminal Performance

		T1	T2	T4	T5	T7	T8
Overall Satisfaction	Overall Satisfaction	3.41	3.61	3.78 H	4.04	3.27	4.07H
	Business	3.43	3.50	3.71 H	4.00	3.40	3.80
	Leisure	3.42	3.55	3.75 H	4.06	3.15	4.10H
	Other*	3.39	4.00	3.98 H	4.02	3.56	4.27
	Leisure & Other	3.41	3.64	3.79 H	4.05	3.25	4.14H
Access	Ground transportation	3.61	4.00	3.73	3.68	3.81	3.68
	Parking	3.79	3.50	3.84	3.20	3.86	3.84
	VFM: Parking facilities	2.89	3.17	2.87	2.54	2.43	3.71
	Baggage carts/trolleys	3.48	3.57	3.62 H	3.69	3.34	3.75
Check-in	Check-in waiting time	3.70	4.14 H	3.77 H	3.84	3.99H	4.01H
	Efficiency of staff	4.06	4.10 H	4.02 H	4.10	4.16H	4.18H
	Courtesy of check-in staff	4.06	4.10 H	4.00 H	3.98	4.11H	4.17H
Security ID Check	Inspection waiting time	3.65	4.04	3.85	3.95	3.70	4.02H
	Courtesy of inspection staff	3.63	4.09	3.82	4.01	3.84	3.80
Security	Courtesy of security staff	3.47	3.96 H	3.73 H	3.90	3.71	3.79H
	Thoroughness	3.73	4.04	3.93	4.06	3.94	4.01H
	Security waiting time	3.32 H	3.98 H	3.65 H	3.85H	3.59H	3.57H
	Safe/secure feeling	3.77 L	4.18	4.06 L	4.16	3.97	4.28
Finding Way	Ease of finding way	3.96	3.67	4.03 H	4.22	3.64	4.25H
	Flight info screens	3.79 H	3.69 H	4.02 H	4.29	3.70	4.27H
	Walking distance	3.99 H	3.74 H	3.47 H	3.73	3.78H	3.91H
	Ease of connections	2.95	3.05	3.75 H	3.83H	3.31	3.89H
Airport Facilities	Courtesy of airport staff	3.62	3.80	3.95	4.04L	3.71	4.05
	Eating facilities	2.82 L	3.37	3.58 L	3.77L	2.84L	3.72
	VFM: Eating facilities	2.46	2.59	2.84 H	3.03	2.39	3.08H
	Availability Bank/ATM/exchange	3.39	3.13	3.71	3.65	2.96	3.78
	Shopping facilities	3.29	3.20	3.86 H	3.62	2.76	3.76H
	VFM: Shopping facilities	2.79	2.74	3.07 H	2.90 L	2.63	3.22H
	Internet / Wi-Fi	2.73	3.60 H	3.01H	3.70	3.16H	3.37H
	Business/Executives Lounges	3.35	3.88	3.80	3.22	2.82	3.58
	Availability of washrooms	3.70 H	3.68H	4.00H	4.22	3.13	4.16H
	Cleanliness of washrooms	3.37 H	3.36	3.80H	4.04	3.33	3.78H
	Comfort of waiting/gate areas	3.19	3.65 H	3.70 H	3.96	3.10	4.09H
Airport Environment	Terminal cleanliness	3.58	3.91 H	4.04 H	4.14	3.53	4.21H
	Airport Ambience	3.29	3.63	3.78 H	4.01	3.10	4.10H
Arrivals Services	Passport inspection	3.72H	NA	3.76 H	3.99	3.57	3.98H
	Baggage delivery speed	3.53	3.41	3.73 H	3.75	3.68	3.77
	Customs inspection	3.50	NA	3.70 H	3.83	3.69	3.85H

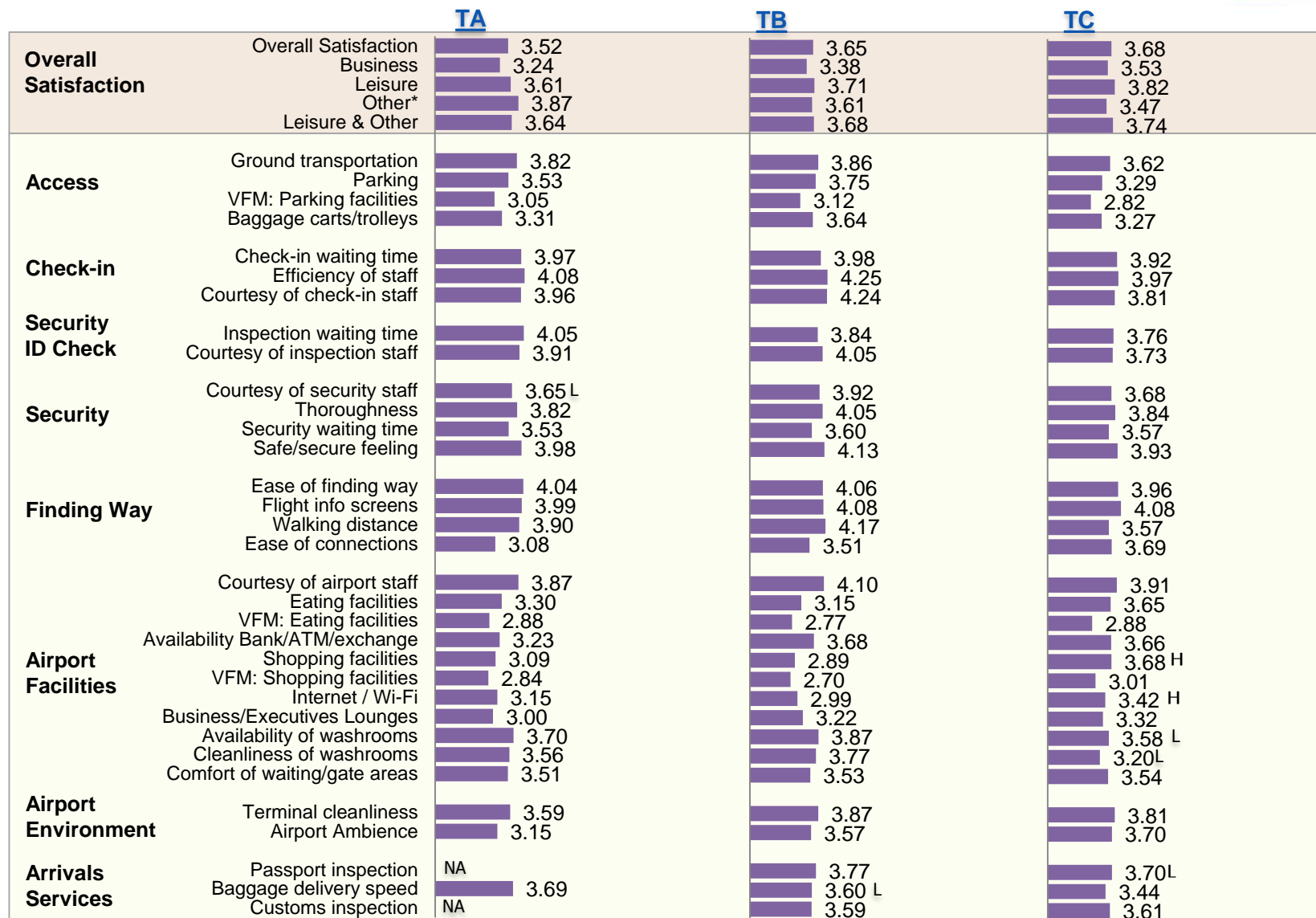
Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit ,Religious events, etc.

NA: Not applicable. H/L: Significantly Higher/Lower than 1st Qtr. 2018.

EWR Terminal Performance

- ➔ **Terminal A:** There were no significant improvements in satisfaction overall in Q2, nor in any of the terminal elements. Terminal A scored highest in satisfaction on check-in staff efficiency (4.08) and lowest on shopping facilities VFM (2.84).
- ➔ **Terminal B:** Satisfaction also remained stable overall and on nearly all terminal elements, except for a significant decline in arrivals baggage speed (3.60). Check-in staff efficiency was also the highest scoring satisfaction element (4.25). Shopping facilities VFM was the lowest scoring satisfaction element (2.70).
- ➔ **Terminal C:** Satisfaction remained stable overall, as did nearly all the terminal elements, except for significant improvement in satisfaction with shopping facilities (3.68) and Internet access/WiFi (3.42), while experiencing a significant decline in satisfaction with restroom availability (3.58) and arrivals passport inspection process (3.70). It scored highest on FIDS (4.08) and lowest on parking facilities VFM (2.82).

EWR Terminal Performance



Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit ,Religious events, etc.
 NA: Not applicable. H/L: Significantly Higher/Lower than 1st Qtr. 2018.

LGA Terminal Performance

- ➔ **Terminals A:** Satisfaction remained stable overall in Q2 as did all terminal elements. Parking facilities VFM scored highest (4.75); shopping facilities scored lowest (2.65).
- ➔ **Terminal B:** Satisfaction declined significantly overall (3.19) and on many terminal elements: ground transportation (3.27), check-in staff courtesy (4.03), TSA ticket checker/ID inspection wait time (3.93) and inspection staff courtesy (3.84), security check personal inspection wait time (3.83), safe/secure feeling (3.99), walking distance (3.86), airport staff courtesy (3.82), eating facilities (2.73) and their VFM (2.50-the lowest scoring terminal element), shopping facilities (2.69), comfortable gate areas (3.02) and airport ambiance (2.77). Check-in staff efficiency (4.14) was the highest scoring satisfaction element.
- ➔ **Terminal C:** There was no significant change in Q2 satisfaction overall or on nearly all of the terminal elements, except for a significant decline in satisfaction with shopping facilities VFM (2.73). The highest scoring satisfaction element was ease of connections (4.37); the lowest scoring was parking facilities VFM (2.50).
- ➔ **Terminal D:** Satisfaction remained stable overall despite a significant decline in satisfaction in Q2 on all three check-in terminal elements, baggage carts (3.49) and security check ID inspection wait time (4.06). Safe/secure feeling scored highest in satisfaction (4.28); parking facilities (2.67) scored lowest.

LGA Terminal Performance

		TA	TB	TC	TD
Overall Satisfaction	Overall Satisfaction	4.03	3.19 L	3.67	3.75
	Business	3.88	2.87 L	3.54	3.87
	Leisure	4.09	3.30 L	3.74	3.76
	Other*	4.00	3.82	3.79	3.50
	Leisure & Other	4.08	3.39	3.74	3.71
Access	Ground transportation	4.28	3.27 L	3.22	3.56
	Parking	4.20	3.09	2.73	2.67
	VFM: Parking facilities	4.75	2.70	2.50	2.73
	Baggage carts/trolleys	4.33	3.42	3.32	3.49 L
Check-in	Check-in waiting time	4.52	4.03	4.23	4.13 L
	Efficiency of staff	4.48	4.14	4.31	4.10 L
	Courtesy of check-in staff	4.29	4.03 L	4.21	4.08 L
Security ID Check	Inspection waiting time	4.46	3.93 L	4.15	4.06 L
	Courtesy of inspection staff	4.43	3.84 L	4.19	4.27
Security	Courtesy of security staff	4.42	3.82	3.97	4.02
	Thoroughness	4.40	3.98	4.08	4.17
	Security waiting time	4.38	3.83 L	3.97	3.95
	Safe/secure feeling	4.53	3.99 L	4.16	4.28
Finding Way	Ease of finding way	4.32	3.71	4.08	4.12
	Flight info screens	4.57	3.77	4.08	4.12
	Walking distance	4.60	3.86 L	4.00	4.09
	Ease of connections	3.00	3.11	4.37	4.27
Airport Facilities	Courtesy of airport staff	4.59	3.82 L	4.08	4.27
	Eating facilities	3.17	2.73 L	3.57	3.72
	VFM: Eating facilities	2.86	2.50 L	2.78	2.86
	Availability Bank/ATM/exchange	3.78	3.32	3.44	3.51
	Shopping facilities	2.65	2.69 L	3.23	3.22
	VFM: Shopping facilities	3.00	2.58	2.73 L	2.84
	Internet / Wi-Fi	3.62	3.19	3.52	3.72
	Business/Executives Lounges	3.13	2.93	3.89	3.52
	Availability of washrooms	4.20	3.32	3.72	4.02
	Cleanliness of washrooms	4.15	3.19	3.67	3.92
Airport Environment	Comfort of waiting/gate areas	3.65	3.02 L	3.45	3.60
	Terminal cleanliness	3.94	3.30	3.80	3.82
Arrivals Services	Airport Ambience	3.52	2.77 L	3.49	3.52
	Passport inspection	NA	NA	NA	NA
	Baggage delivery speed	4.27	3.58	3.95	3.95
	Customs inspection	NA	NA	NA	NA

Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit ,Religious events, etc.

NA: Not applicable. H/L: Significantly Higher/Lower than 1st Qtr. 2018.

Conclusions and Recommendations:

- ➔ **JFK satisfaction continues to show significant improvement overall and across many elements compared to Q1. EWR remained stable with no significant improvement compared to Q1. LGA receded in passenger satisfaction in Q2, with no improvement overall or across the airport elements.**
- ➔ **However, the QTQ improvements in passenger satisfaction we've observed have yet to emerge as competitive advantages in the comparisons to the Peer Airport Panels, in that the three PA airports rank last or second to last overall and on nearly all airport elements.**
 - ✓ **Does this indicate that the Peer Panels are improving at the same time as the PA Airports? Or, do we need to bolster positive public opinions of our airports to help insulate travelers from negative press?**
- ➔ **Next steps: the ACI ASQ Survey and CSE Mystery Shopping results indicate that a focus on the lowest scoring elements that are important to our travelers (e.g., Internet access/WiFi, gate area comfort, restroom cleanliness/condition/functionality and better food-beverage selection in the gate areas will eventually impact passenger perceptions relative to our Peer Panels. We should continue to deploy our new 2018 customer initiatives and advance our communications programs and platforms to inform and guide our customers in ways that that will enhance their experience on airport.**

Thank You!



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