

Executive Summary

- All three Port Authority Airports (JFK, EWR and LGA) participating in the Q3 2019 ACI ASQ Monitor conducted among departing air passengers have experienced continuous year-over-year (YOY) improvement in air passenger satisfaction performance since Q4 2018 through Q2 2019. However, satisfaction has started to diminish significantly from its peak in Q1 2019, as we entered the peak summer season travel period in Q3.

Performance Year-Over-Year

- JFK and LGA overall passenger satisfaction remained steady in Q3 2019: JFK -- 3.83 mean score, no change; LGA -- 3.50 mean score, up .04. EWR airport passenger satisfaction receded significantly YOY in Q3 2019 -- 3.55 mean score, down .10
- JFK airport passenger satisfaction also remained steady for business travelers (3.67) and those traveling for personal reasons (3.85), but improved significantly on ground transportation (3.86), baggage carts (3.81), shopping facilities value for the money – VFM (3.14) and Internet/Wi-Fi access (3.67). It remained steady on most airport elements:
- Parking (3.73) and its VFM (3.28)
 - Check-in staff efficiency (4.01) and Courtesy (3.98)
 - Security check ticket/ID verification staff courtesy (3.82) and TSA courtesy (3.75)
 - Thoroughness (3.95) and safe/secure feeling (4.06)
 - Ease of finding way (4.06), walking distance (3.75) and ease of connections (3.74)
 - Airport staff courtesy (3.96)
 - Eating facilities (3.55) and their VFM (2.94)
 - Shopping facilities (3.70) and their VFM (3.14)
 - ATM/Money Exchanges (3.71)
 - Business lounges (3.63) and comfort of gate area (3.67)
 - Restroom availability (3.96)
 - Terminal cleanliness (3.91) and airport ambience (3.74)
 - Arrival passport inspection (3.83), customs inspection (3.76) and bag speed (3.76)

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JFK lost ground YOY on a few airport elements: security check wait-time at Ticket/ID verification (3.84) and at the magnetometer (3.66), FIDS (3.99) and terminal cleanliness (3.91).

→ LGA airport passenger satisfaction improved significantly on shopping facilities (3.28), comfort at the gate (3.42), terminal cleanliness (3.58) and airport ambience (3.32). It remained steady YOY among leisure (3.55) and business (3.25) travelers and on parking facilities (3.09) and their respective VFM (2.08), baggage carts (3.45), and on nearly all airport facility elements:

- Eating facilities (3.33)
- VFM: Eating facilities (2.79)
- Availability Bank/ATM/exchange (3.55)
- Shopping facilities (3.28)
- VFM: Shopping facilities (2.91)
- Internet / Wi-Fi (3.51)
- Business/Executives Lounges (3.34)
- Availability of washrooms (3.69)
- Cleanliness of washrooms (3.53)
- Comfort of waiting/gate areas (3.42)

and arrival bag speed (3.60).

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LGA satisfaction receded significantly YOY on:

- Ground transportation (3.31)
- All three check-in elements: check-in waiting time (3.69), efficiency of staff (3.87) and courtesy of check-in staff (3.85)
- All six security check elements: ticket/ID Inspection waiting time (3.83), courtesy of ticket/ID inspection staff (3.81), courtesy of TSA agents (3.71), thoroughness of inspection (3.85), security check wait-time (3.70) and safe/secure feeling (3.99)
- Airport staff courtesy (3.82)
- Three of four wayfinding elements: ease of finding way (3.79), FIDS (3.83), walking distance (3.81).

→ EWR passenger satisfaction improved significantly YOY on Internet/Wi-Fi access (3.53) and arrival bag speed (3.62). It remained steady on most airport elements, including all four airport access elements, all three check-in elements, all four wayfinding elements, nearly all 11 airport facility elements (except Internet/ Wi-Fi), arrival passport (3.84) and customs (3.76) inspection and courtesy of the security check ticket/ID verification staff (3.83) and TSA agents (3.74).

EWR satisfaction declined significantly for both leisure (3.58) and business (3.45) travelers, and on wait-time at the security check ticket/ID verification (3.74) and at the magnetometer (3.55), for thoroughness (3.86), safe/secure feeling (3.91, also the highest scoring element in Q3 2019), terminal cleanliness (3.66) and airport ambience (3.42).

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Performance Quarter-to-Quarter

- ➔ Quarter-to-quarter (QTQ) overall satisfaction performance for all three PA Airports continued to recede significantly from its peak in Q1 2019.
- ➔ JFK improved significantly on ground transportation (3.86) and remained steady on:
 - Parking (3.73)
 - Parking facilities VFM (3.28)
 - Baggage carts/trolleys (3.81)
 - Check-in staff efficiency (4.01) and courtesy (3.98)
 - All 6 security check elements
 - Ease of finding way (4.06)
 - Walking distance (3.75)
 - Ease of connections (3.74)
 - Eating facilities (3.55) and their VFM (2.94)
 - Availability of ATM/Money exchanges (3.71)
 - Shopping facilities (3.70) and their VFM (3.14)
 - Business lounges (3.63)
 - Arrival passport (3.83) and customs (3.78) inspection
 - Arrival bag speed (3.76)

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- ➔ Despite this positive performance, JFK continues to lose ground QTQ, with significant declines on a number of airport elements in Q3 2019:
 - Overall satisfaction (3.83) and among leisure travelers (3.82)
 - Check-in wait-time (3.82)
 - FIDS (3.99)
 - Airport staff courtesy (3.96)
 - Wi-Fi/Internet (3.67)
 - Restroom availability (3.96) and cleanliness (3.73)
 - Terminal cleanliness (3.91)
 - Comfort at the gate (3.67)
 - Airport ambience (3.74)
- ➔ LGA remained steady on:
 - All four airport access elements: ground transportation (3.31), parking facilities (3.09) and their VFM (2.80), and baggage carts/trolleys (3.45)
 - Eating facilities VFM (2.79)
 - Availability of ATM/Money exchange (3.55)
 - Shopping facilities (3.28) and their VFM (2.91)
 - Business lounges (3.34)
 - Restroom availability (3.69)
 - Arrival bag speed (3.60)

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Despite this, LGA continues to lose ground QTQ in satisfaction, significantly lower in Q3 2019 on:

- Overall satisfaction (3.50) and among leisure travelers (3.55)
- All three check-in elements
- All six security check elements
- Airport staff courtesy (3.82)
- Eating facilities (3.33)
- Restroom cleanliness (3.53)
- Comfort at the gate (3.42)
- Terminal cleanliness (3.58)

→ EWR remained steady since Q3 2019 on a handful of airport elements:

- All four airport access elements: ground transportation (3.80), parking facilities (3.57) and their VFM (2.98) and baggage carts (3.60)
- Ease of connections (3.55)
- Availability of ATMs/Money exchanges (3.52)
- Shopping facilities (3.39) and their VFM (3.02)
- Arrival passport (3.84) and custom (3.76) inspection

EWR continues to fall behind QTQ in satisfaction on many elements, significantly lower in Q3 2019 on overall satisfaction (3.56) and for both leisure (3.58) and business (3.45) travelers, all three check-in elements and all six security check elements, 3 of 4 wayfinding elements, most of the 11 airport facility elements and arrivals bag speed (3.62).

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Performance Against Peer Airport Panels

- Port Authority Airport performance against the Port Authority Peer airports is showing continued improvement for JFK against a couple of peer airports outside the top 25 world class airports, while EWR and LGA showed a decline in performance relative to all their peer airports.
- JFK underperforms its peer airports overall and on most airport elements, it's performance ranking last (7) or toward the bottom on most airport elements. However, JFK continues to outperform AMS and/or LAX on a number of elements. In Q3 2019, JFK leads on: parking facilities VFM – (3.28 for JFK vs. 2.59 for AMS and 2.84 for LAX), ease of finding way (4.06 for JFK vs. 3.93 for AMS and 3.90 for LAX), check-in wait-time (3.82 for JFK vs. 3.65 for AMS), walking distance (3.75 for JFK vs. 3.36 for AMS) and comfort at the gate (3.67 vs. 3.37 for AMS). JFK is on a par with AMS on parking facilities (3.50), baggage carts (3.89), check-in staff efficiency (3.96) and courtesy (4.03), security check ticket/ID verification wait-time (3.78), FIDS (3.95), and almost all 11 airport facility elements, except airport staff courtesy (4.08, where JFK leads significantly).
 - JFK significantly outperforms LAX on overall satisfaction (3.83 for JFK vs. 3.74 for LAX) and among leisure travelers (3.82 vs. 3.75) and on a number of airport elements: all four airport access elements (ground transportation -- 3.86 vs. 3.43; parking facilities -- 3.73 vs. 3.20; parking facilities VFM -- 3.28 vs. 2.84; and baggage carts - 3.81 vs. 3.63), ATM/Money exchange (3.71 vs. 3.57), shopping facilities (3.71 vs. 3.49) and their VFM (3.70 vs. 2.98), terminal cleanliness (3.91 vs. 3.86), airport ambience (3.74 vs. 3.63) and arrival bag speed (3.78 vs. 3.69). JFK performs on a par with LAX on safe/secure feeling (4.11 for LAX), FIDS (4.03), walking distance (3.80), Ease of connections (3.68), eating facilities (3.60) and their VFM (2.90), Wi-Fi/Internet (3.67), business lounges (3.63), restroom availability (4.00) and arrival customs inspection (3.80).

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- LGA also still significantly underperforms its peer airports overall and on nearly all airport elements, with nearly all airport elements ranking last (6) or next to last. Nonetheless, LGA moved up to 4th rank on arrival bag speed (3.70) against the peer airports, where it performs on a par with BOS (3.55), MSP (3.73) and PHL (3.58). LGA also performs on a par with BOS on parking facilities (3.38) and their VFM (2.50, also on a par with PHL – 3.11) and ease of connections (3.93). LGA performs on a par with MSP on security ticket/ID verification wait-time (4.27) and security ID staff courtesy (4.60), walking distance (3.81) and ease of connections (3.91) – the same parity exits for LGA and PHL on these latter two wayfinding elements (3.76 and 3.85, respectively).
- EWR also still significantly underperforms its peer panel airports on passenger satisfaction overall and on numerous airport elements, with nearly all airport elements ranking last (6) or next to last. However, EWR improved on its ranking of two airport elements continuing to hold 4th or 5th rank. Parking facilities and their respective value for the money (VFM) are relative strengths for EWR – the former being the only airport element ranked 4th. EWR parking facilities perform on a par with BOS (3.38), MSP (3.85) and SEA (3.53) as well as their respective VFM against MSP (3.35), MUC (3.22), SEA (3.05) and YYZ (3.39). EWR also performs on a par with SEA on baggage carts (3.75), MSP on security check ticket/ID verification wait-time (4.27) and security ticket/ID inspection staff courtesy (4.60), BOS on arrival passport inspection (3.86), bag speed (3.55) and customs inspection (3.70) and MUC on arrival passport inspection (3.89).

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Focus Areas

- ➔ There are several specific airport elements identified by ACI as being both important (very desirable) to JFK, LGA and EWR passengers, yet still unfulfilled among these same passengers:
 - Lower wait-times at check-in, the security check ticket/ID inspection and near the TSA magnetometer, and ground transportation.
 - Ease of finding your way through the airport is also an issue for EWR.

Key Challenges

- ➔ There are several aspects of the airport environment that pose particular challenges to achieving improved satisfaction performance among air passengers as well as issues with the ACI ASQ survey sampling and questionnaire design.
 - High seasonal passenger volumes, weather/traffic disruptions and IROPS influence ACI ASQ results creating stress with longer wait times at airline check-in and security check operations including TSA staffing issues and issues with maintaining optimum airline and terminal facility performance, e.g., maintenance of clean restrooms and comfortable gate areas. All of this yields poorer passenger satisfaction.
 - Ongoing redevelopment and construction impact satisfaction scores centering on airport access and present wayfinding challenges due to relocation of taxis, Uber/Lyft and shuttles.
 - ACI ASQ survey protocols can cause alignment with peak travel holiday periods, especially in the third month of the quarter when the available survey dates are compressed into two weeks (e.g., Labor Day). The recent deployment of electronic surveys with a new sequence of the rating items that nested two airport elements with the overall satisfaction measure may have inadvertently impacted EWR overall satisfaction.