



J.D. POWER

2019 Airport Satisfaction StudySM



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October

Key Insights

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

EWR ranks 19th in the Mega Airport segment

EWR also ranked 19th in 2018

Passenger volume at EWR has increased+ 30% in past 5 years,
creating Access, TSA and crowding issues

Access is EWR's key concern. Traffic volumes on the way to
airport are at the Mega average. Signs and Directions scores are
poor especially "Clarity", "Enough" and "Easy to Understand"

Terminal C receives higher marks overall and scores well for
Food and Beverage. Lower-cost food choices would help with
EWR's poor "pricing" perception

Improvements rolling to Terminals A & B should help EWR's
overall score.

Methodology

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

Quick Facts:

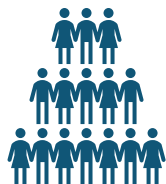
Online Survey

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 EWR 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)

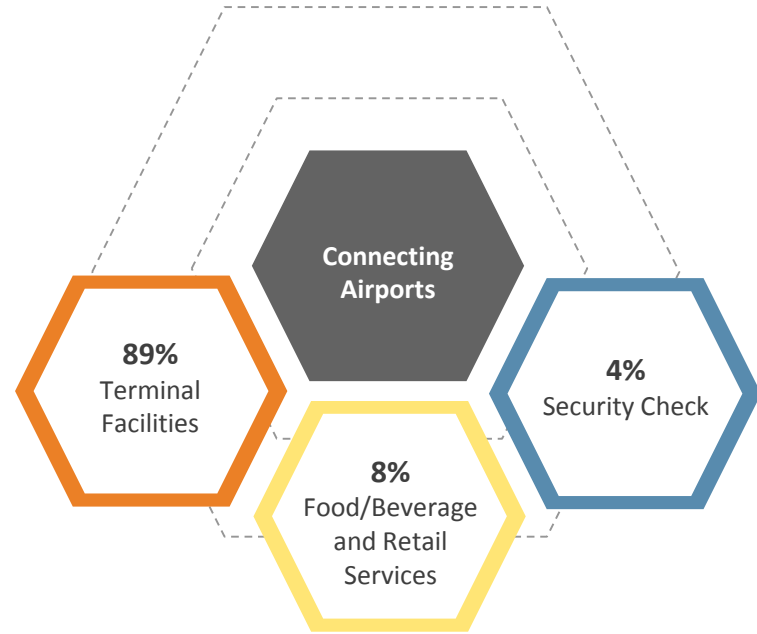
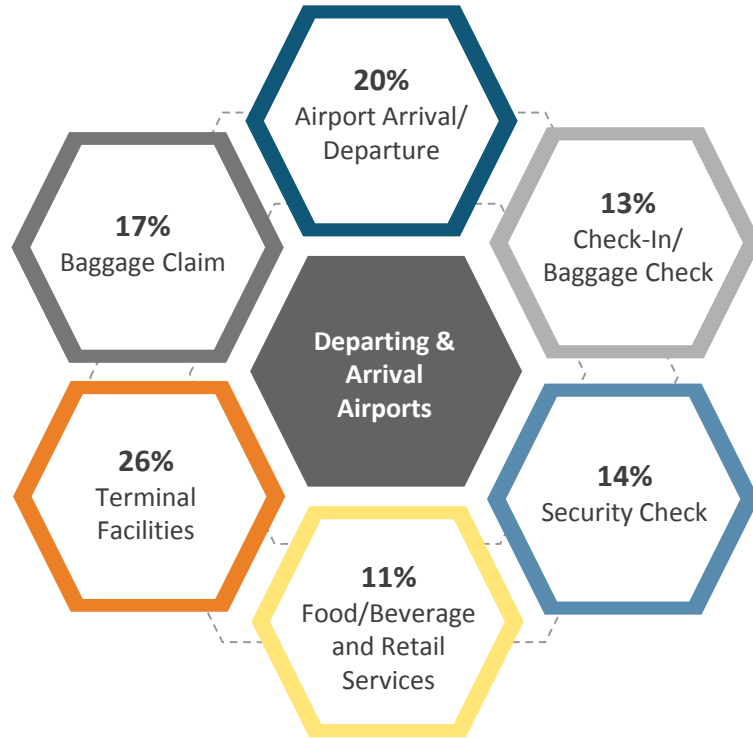
#insufficient sample (n<30)



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



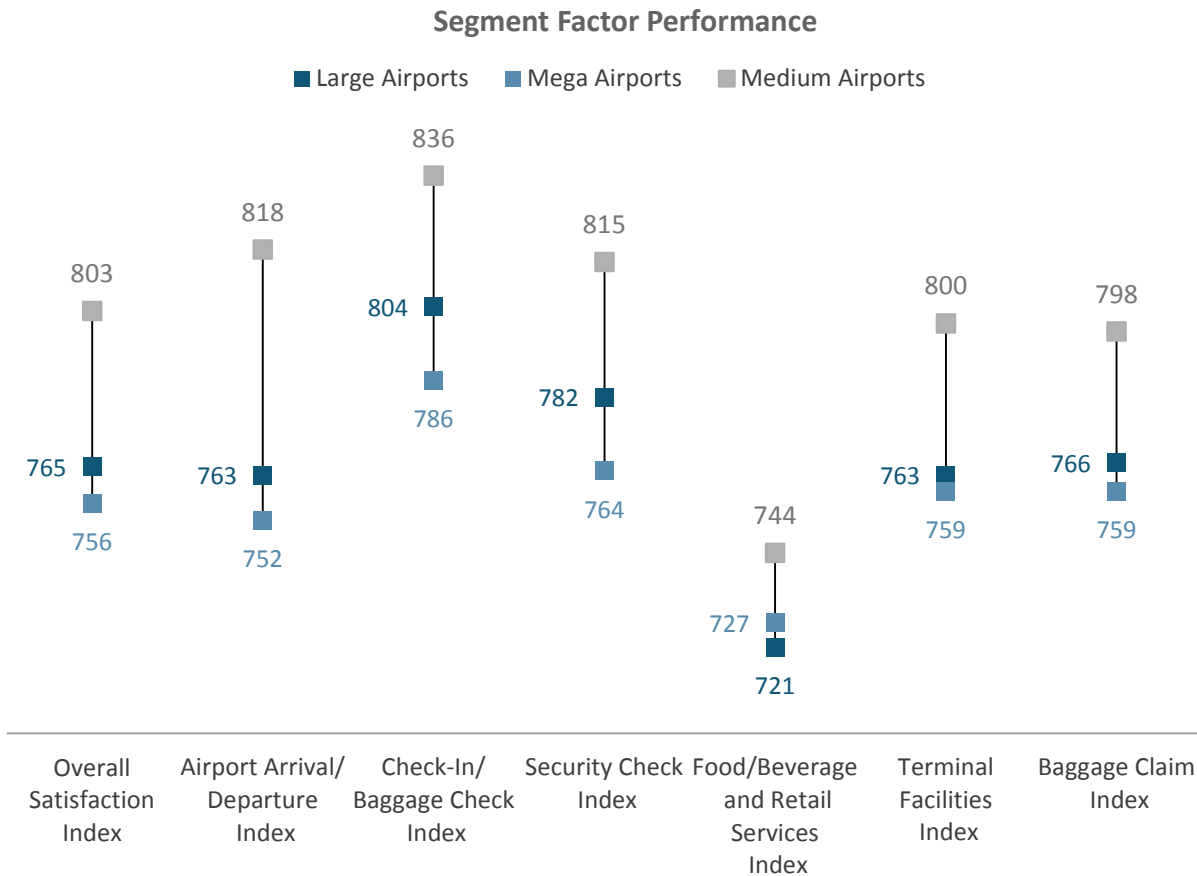
Percentages may not equal 100% due to rounding.



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

EWR ranks last in overall satisfaction in the Mega category, scoring 61 points below the Mega average and 31 points below LAX

EWR ranked 19th in the Mega Airport segment in 2018

Passengers say:

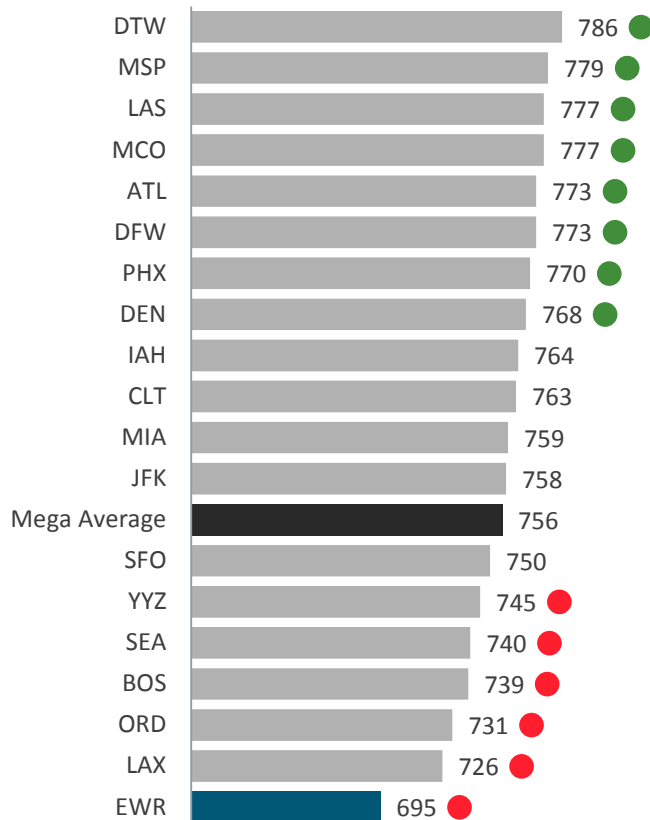
"Airport is just OK. Traffic is terrible and flight delays occur often."

"Convenience. High variety of destinations. Reasonable airfares. "

"Unfortunately, it is a pretty busy airport so you do have to check in for a flight and get to your gate or to the airport allow yourself a few extra hours."

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

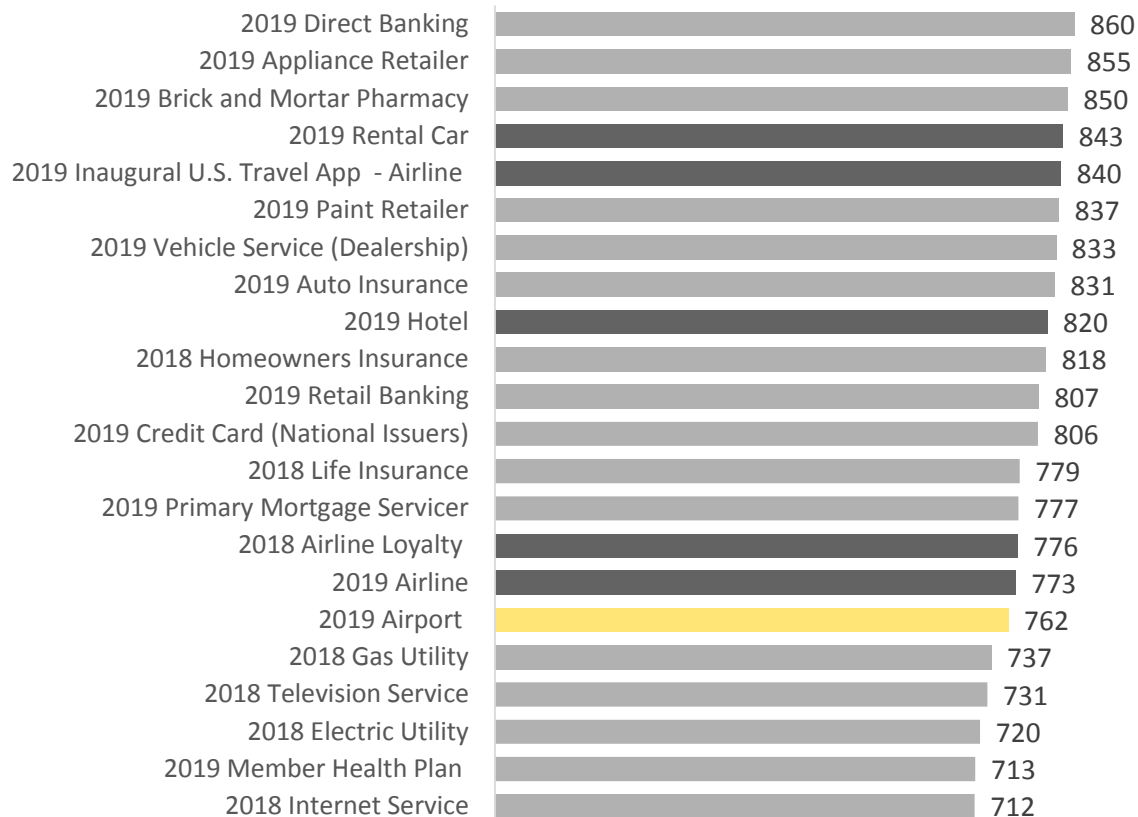
Overall Satisfaction Index: Mega Airports



How Do Airports Stack Up?

Airport satisfaction is on par with Airline satisfaction

Cross Industry Rankings (Service Industries)



Factor Performance

EWR's highest score is in Check-In/Baggage Check and lowest score is in Food/Beverage and Retail Services, similar to other Mega airports

Factor Performance

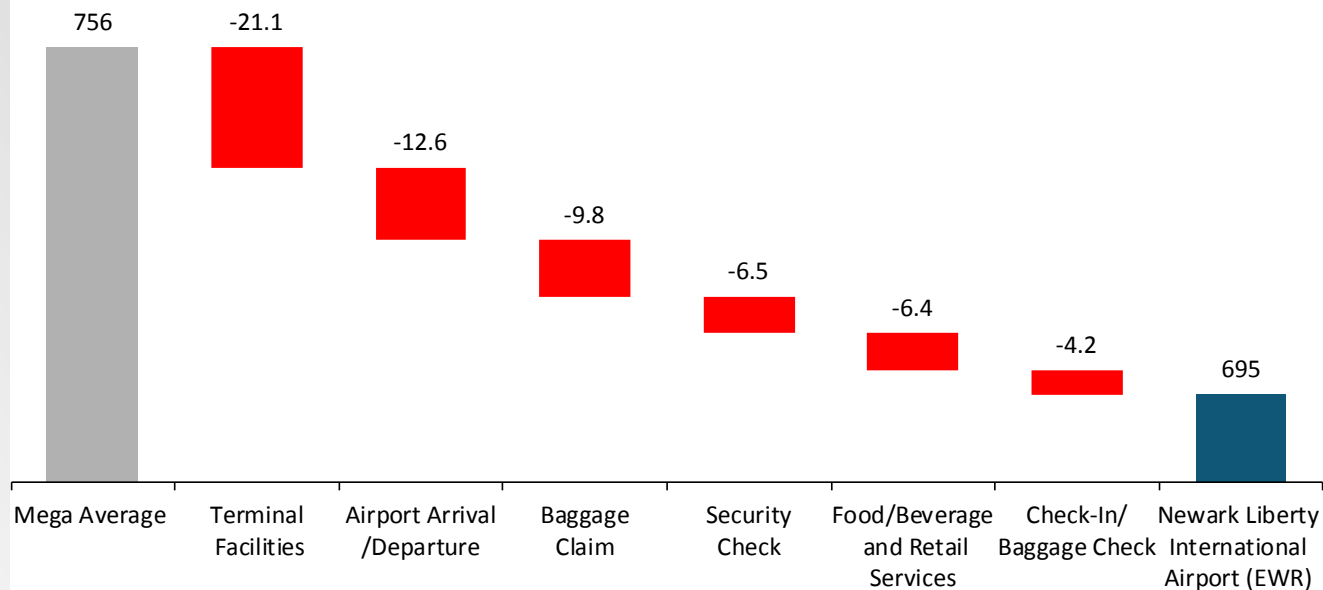
	EWR	Mega Airports	JFK
Overall Satisfaction Index	695	756	758
Airport Access Index	680	752	729
Check-In/Baggage Check Index	748	786	768
Security Check Index	713	764	753
Food/Beverage and Retail Services Index	669	727	734
Terminal Facilities Index	698	759	765
Baggage Claim Index	690	759	752

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

SWOOP Brand vs. Segment

Compared to the Mega airport average EWR's greatest opportunity is in Terminal Facilities

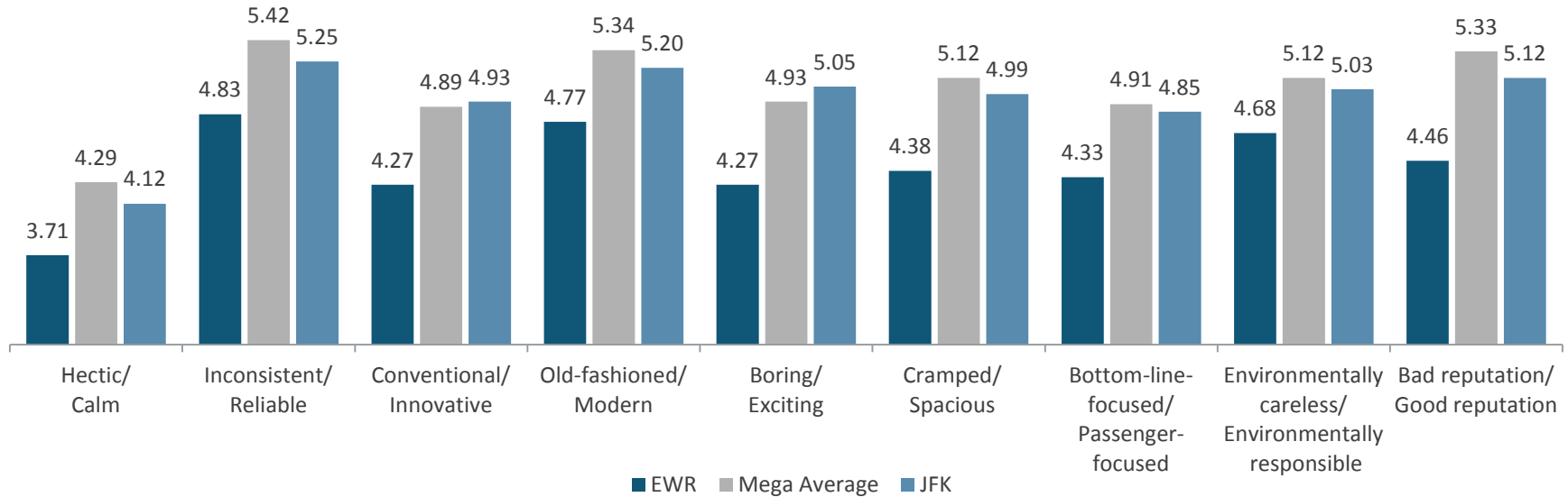
Weighted Gaps – Client vs. Segment Airport Average



Brand Image

EWR's strongest images are reliable, modern and environmentally responsible but trails the Mega average and JFK in brand image

Brand Image Performance



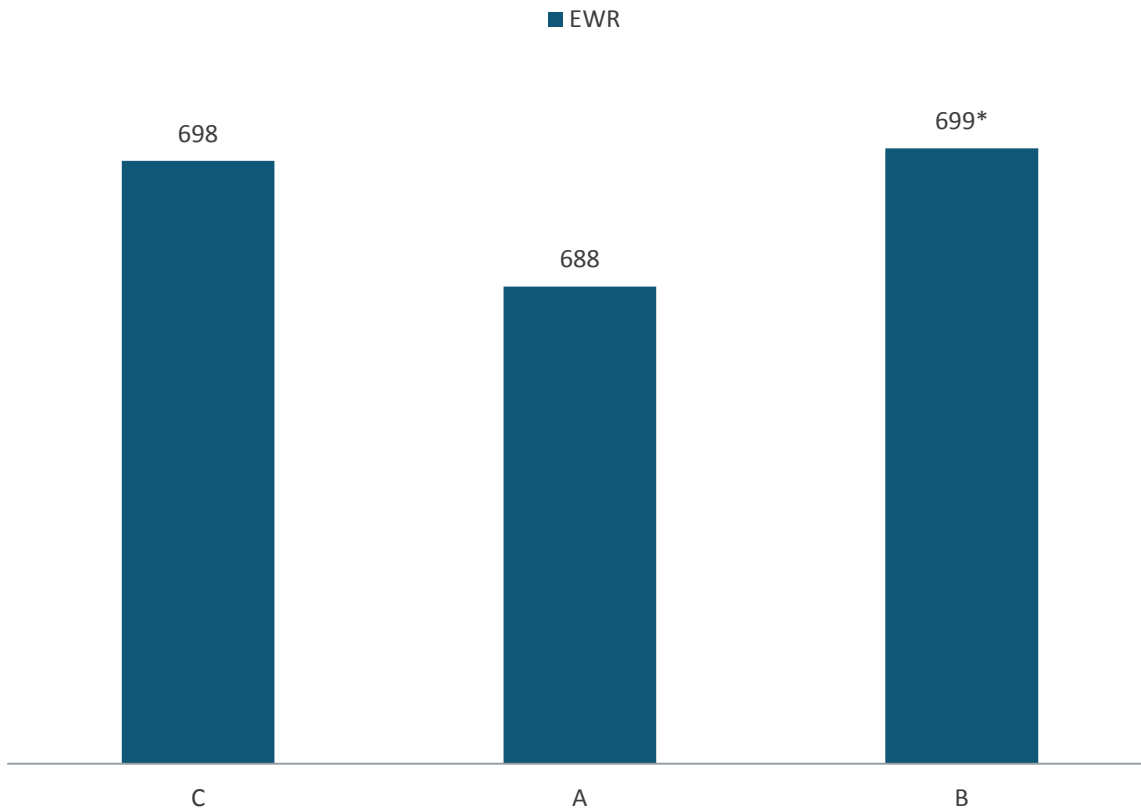
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Terminal Performance

Passengers that use terminal C are the most satisfied

"Close to my house. Easier than LGA or JFK. Terminal C is nice. A and B are dumps."

Overall Satisfaction by Terminal for O&D Passengers



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

The ROI of Satisfaction

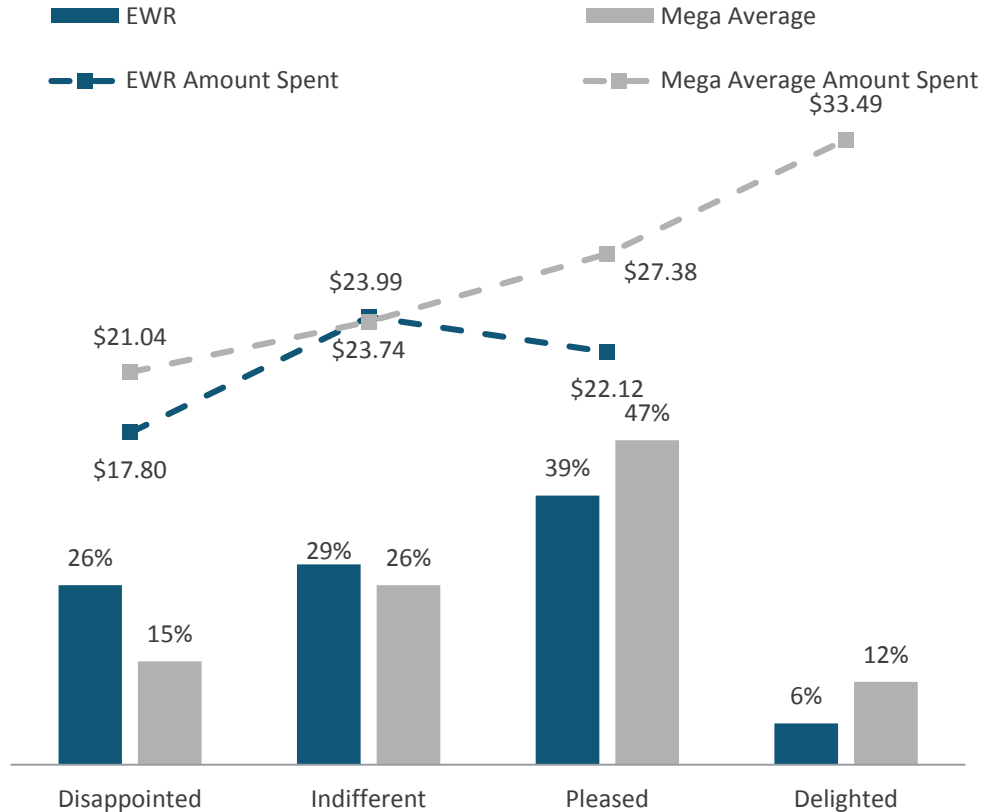
Delighted passengers spend more

EWR passengers on average spend \$21 in the terminal with Mega airports averaging \$26 in terminal spend.

Mega airports on average have more delighted and pleased passengers than EWR.

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

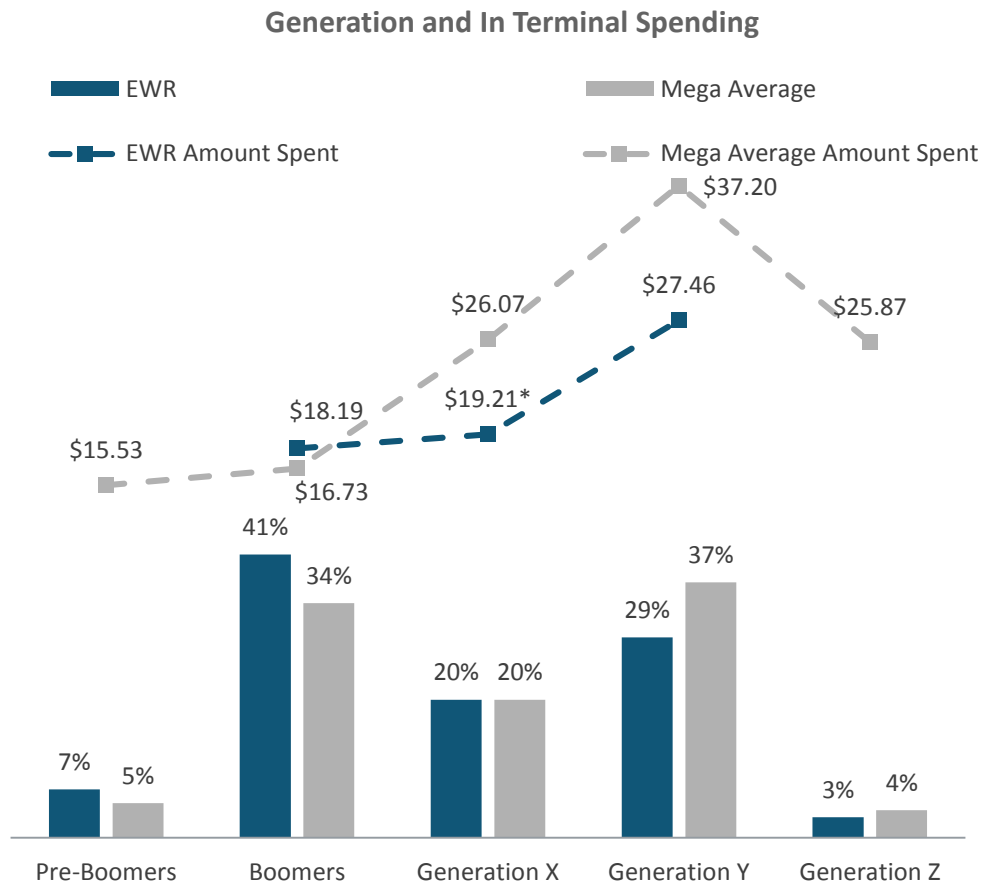
Overall Satisfaction and In Terminal Spending



The ROI of Satisfaction

Younger generations tend to spend more at airports than older generations

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

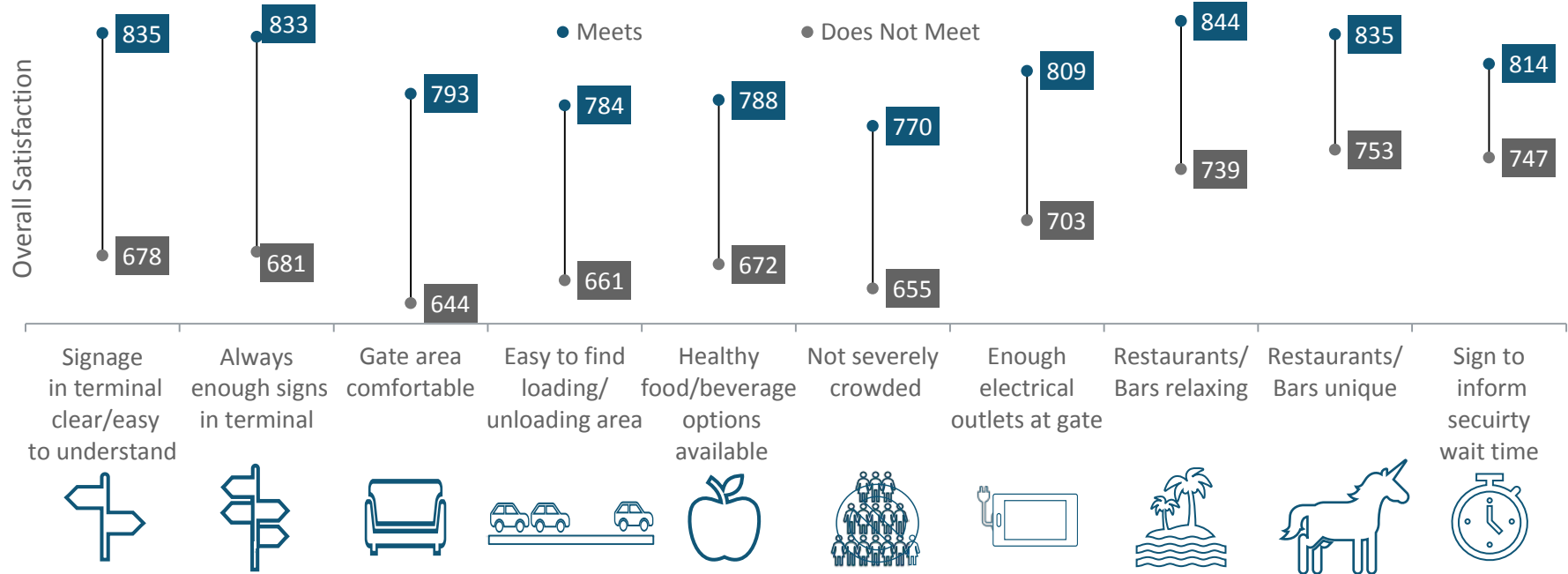


*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30)

Key Performance Indicators

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

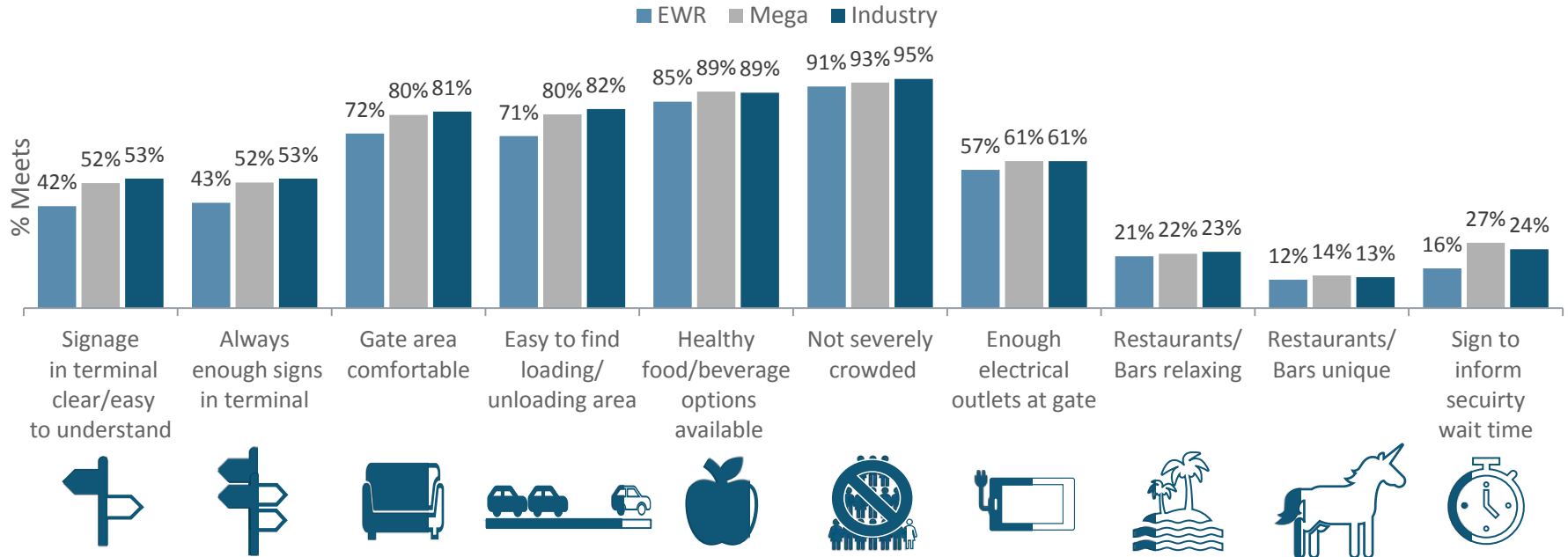
Top KPIs Overall Satisfaction Impacts – Total Industry



Key Performance Indicators

EWR trails the Mega average in sign to inform security wait time, signage in terminal clear/easy to understand and easy to find loading/unloading area

Top KPIs



Don't know is excluded from calculation for signage in terminal clear/easy to understand, always enough signs in terminal, gate area comfortable, easy to find loading/unloading area, healthy food/beverage options available, enough electrical outlets at gate and sign informing security wait times.



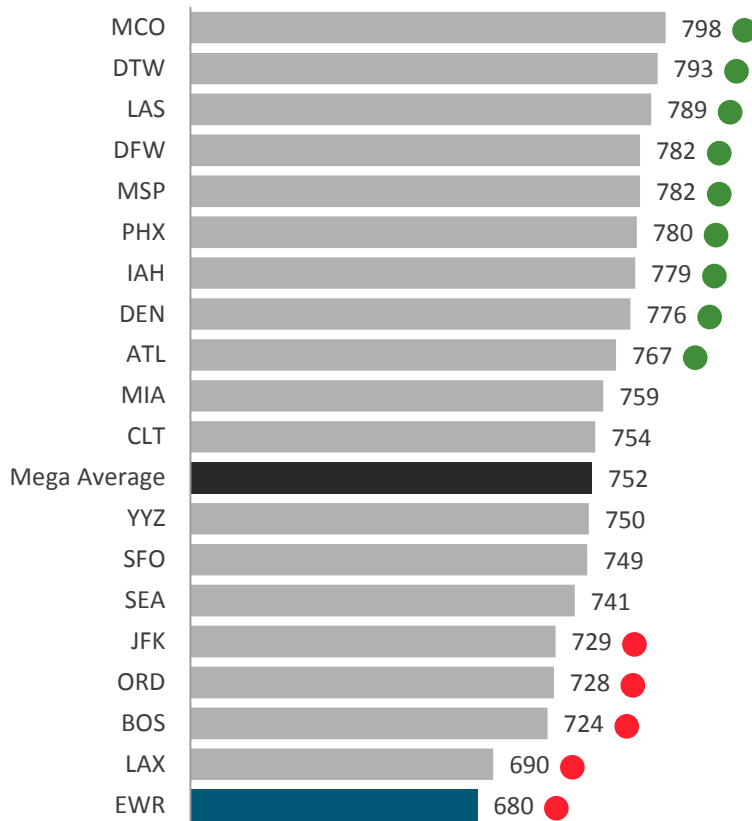
Airport Access

Airport Access Satisfaction

EWR ranks last in Airport Access among Mega airports, scoring 10 points below 18th ranked LAX

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

Airport Access Index: Mega Airports



Airport Access

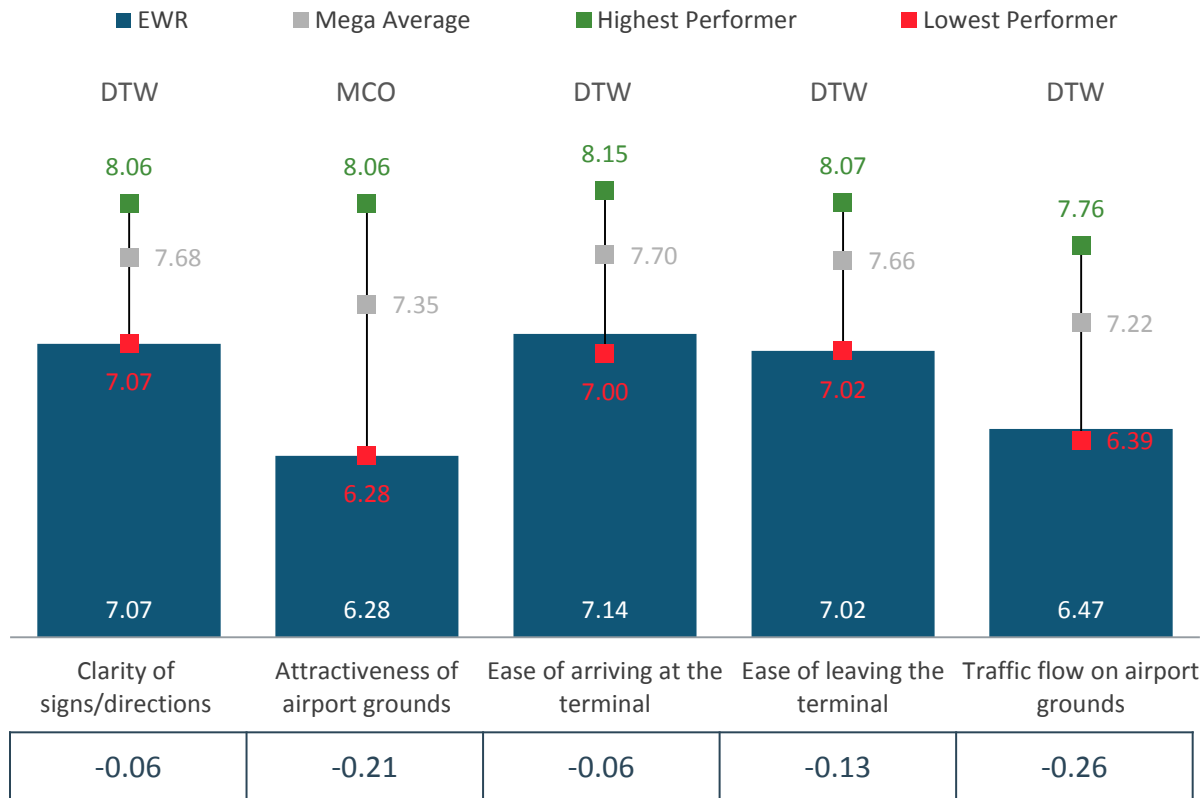
EWR is rated lowest in *Clarity of signs/directions*, *Attractiveness of airport grounds* and *Ease of leaving the terminal*

EWR scores above LAX in *Ease of arriving at the terminal* and *Traffic flow on airport grounds*.

"The traffic/ layout of pick up and drop off is messy and stressful."

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

Attribute Performance

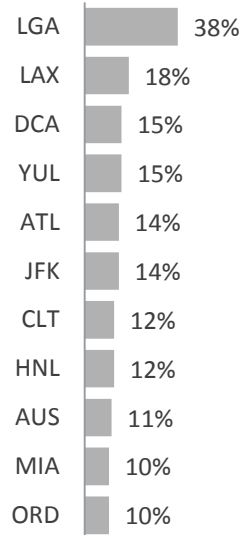


Airport Access

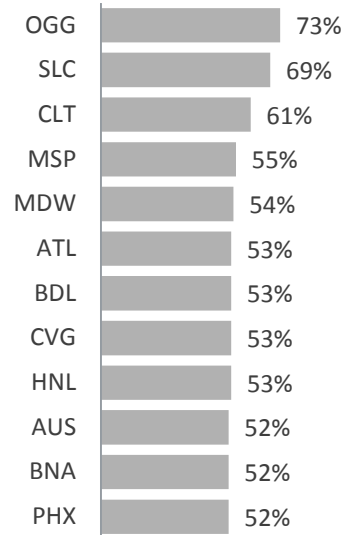
Airport Access satisfaction is 116 points lower when construction delays access to the airport.

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

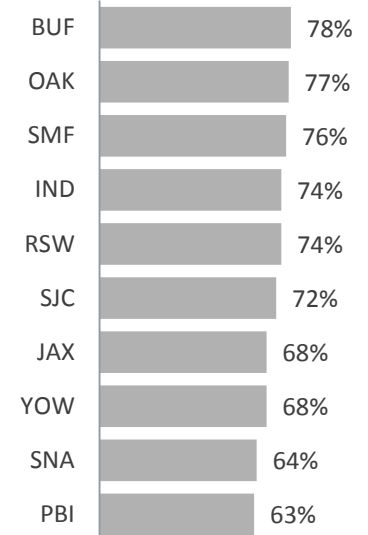
**Construction Present and Delayed
Access**



**Construction Present – Did Not Delay
Access**



Did Not Notice Construction



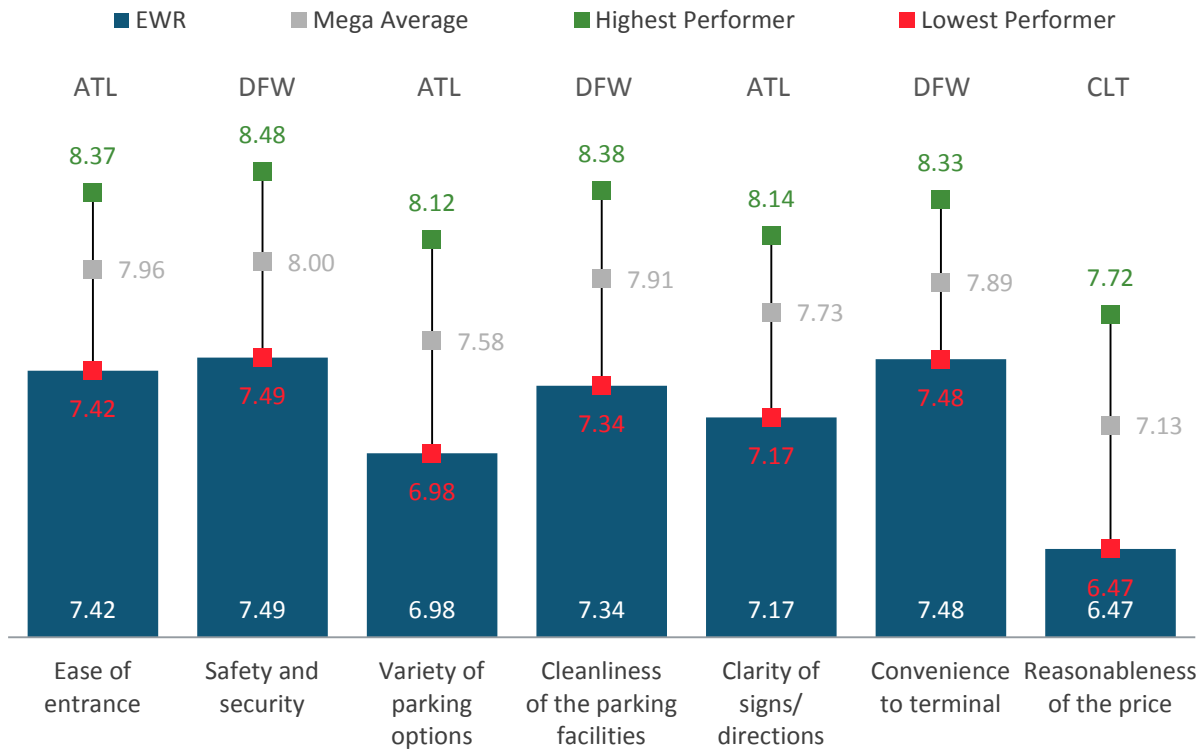
EWR is the lowest performer in all Parking attributes

“parking is prohibitively expensive and far away from the terminal”

“Parking is easy and they offer free shuttle service.”

“It's too busy, and the signage is awful...so hard to find the right terminals and parking areas”

Attribute Performance – Parking



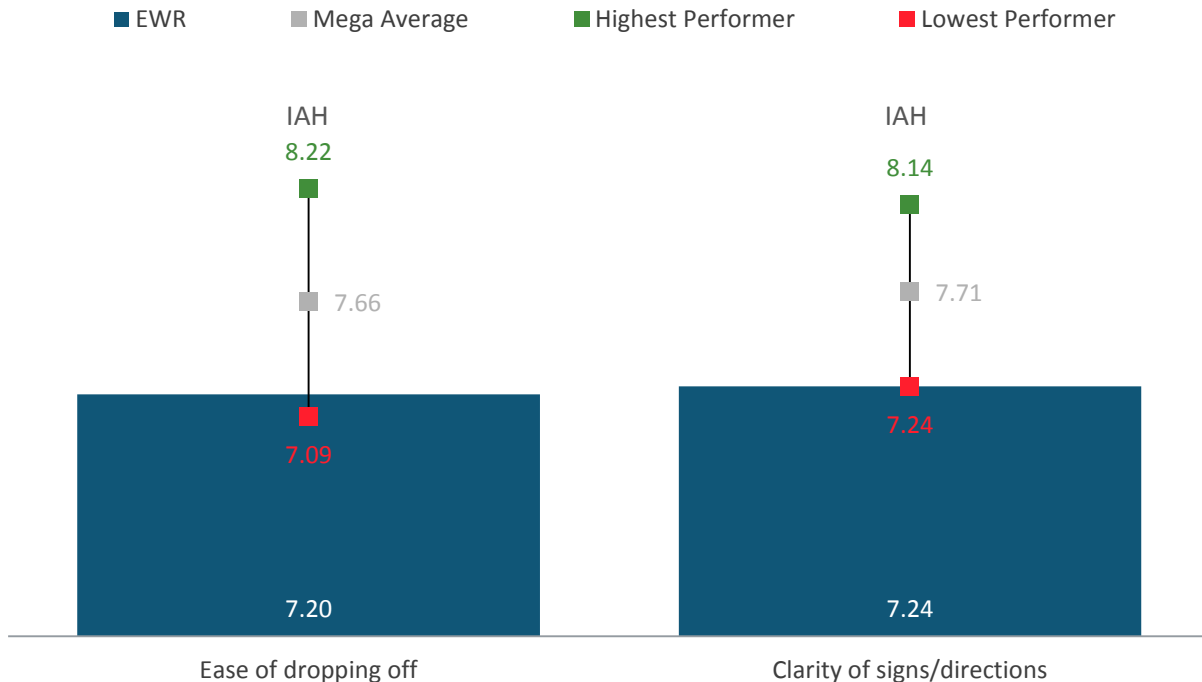
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Airport Access

EWR scores lowest in *Clarity of signs/directions* but scores higher than LAX in *Ease of dropping off*

Signage at EWR does not seem to conform completely to the established signs package.

Attribute Performance – Drop Off



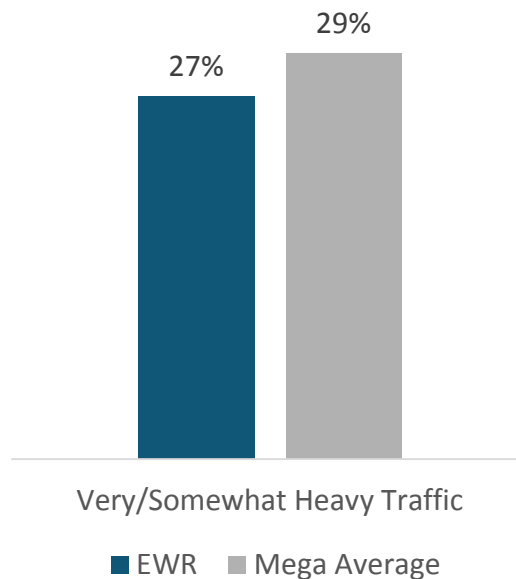
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Airport Access

Traffic congestion impacts Airport Access Satisfaction

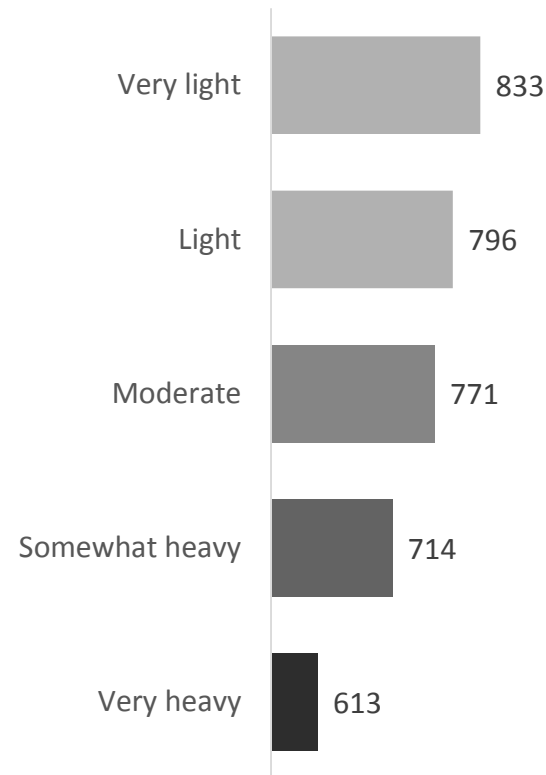
EWR's traffic outside the terminal is perceived as slightly lighter than the Mega airport average.

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

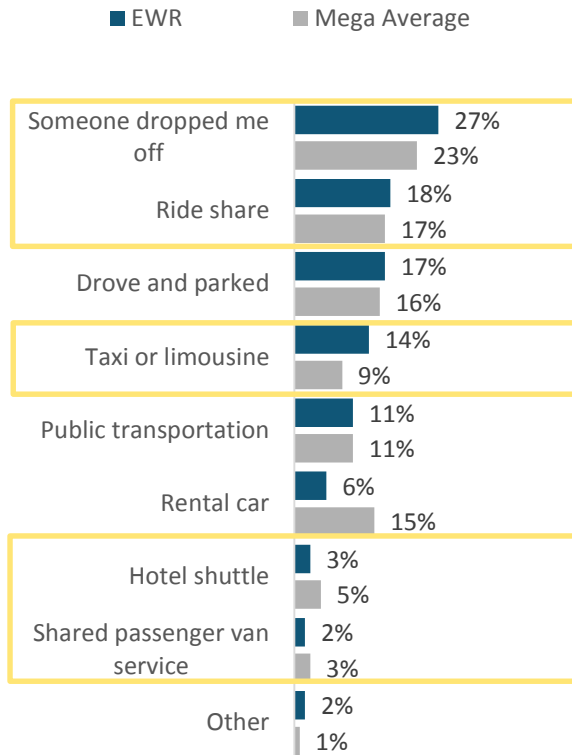


Airport Access

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

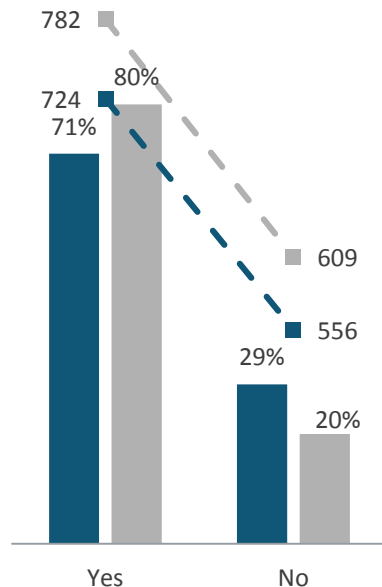
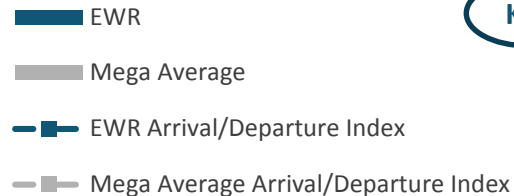
Highlighted responses are those that answer the question “was it easy to find curb space upon arrival?”

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).



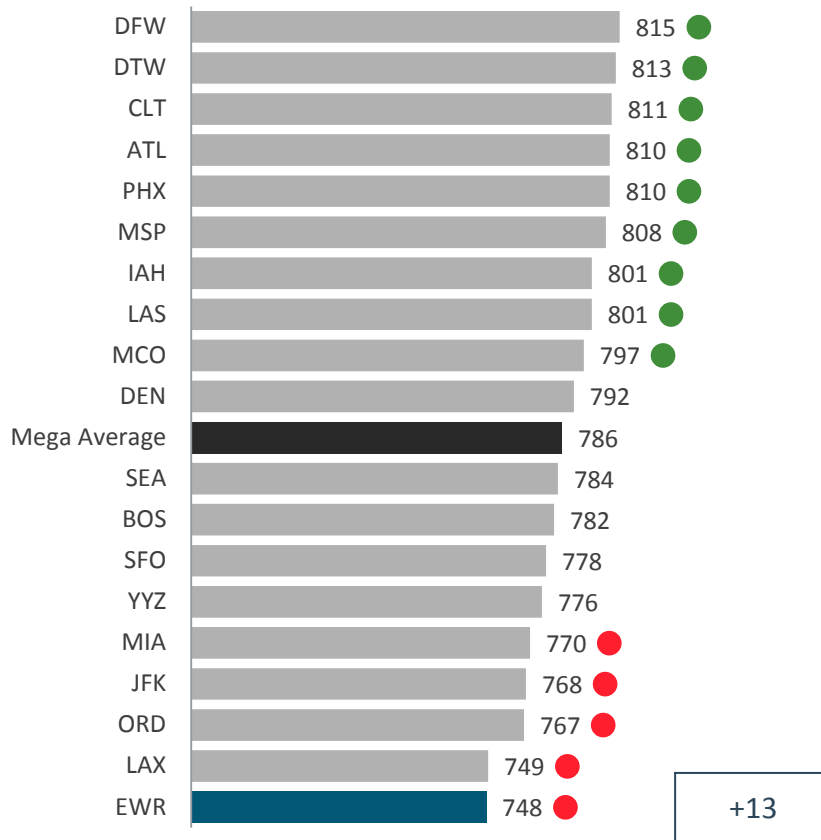
Check-In/Baggage Check

Check-In/Baggage Check Satisfaction

EWR ranks last in Check-In/Baggage Check, just one point behind LAX

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

Check-In/Baggage Check Index: Mega Airports



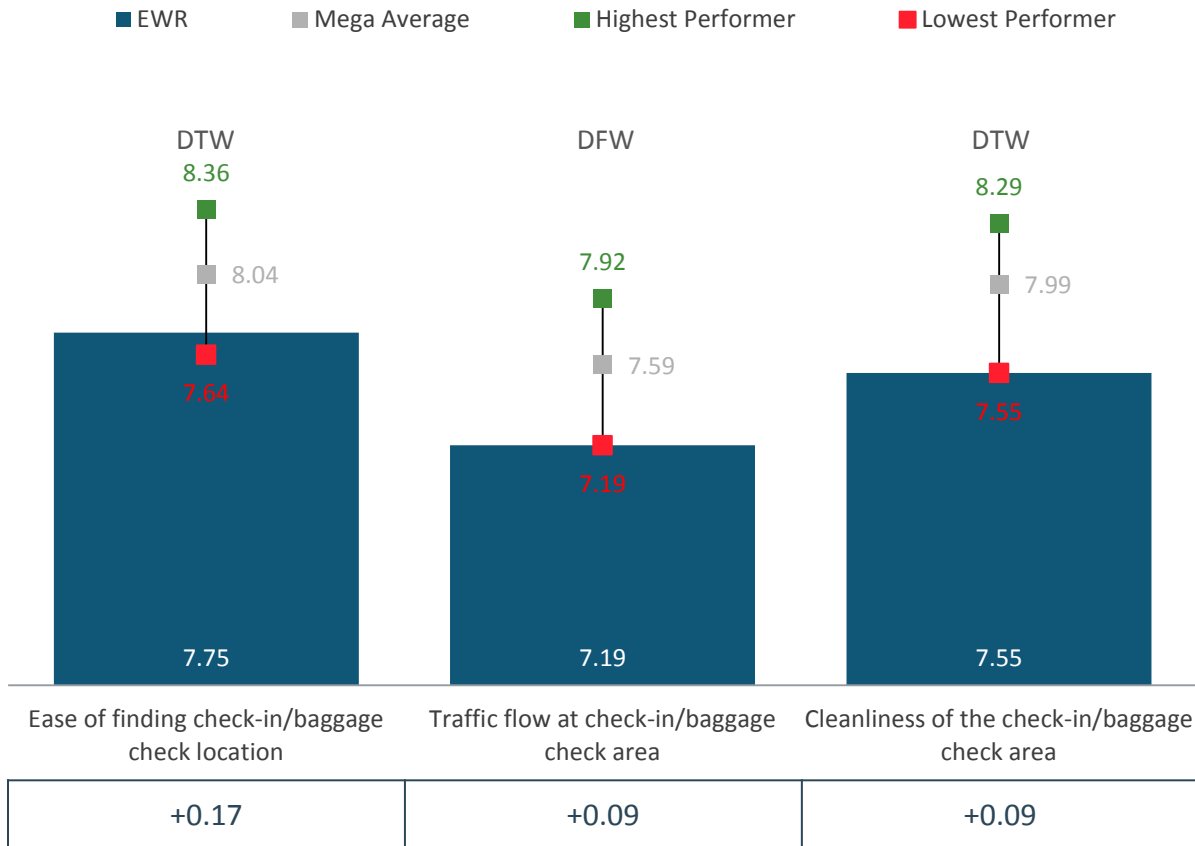
Check-In/Baggage Check

EWR ranks lowest in *Traffic flow at check-in/baggage check area* and *Cleanliness of the check-in/baggage check area*

EWR ranks higher than LAX in *Ease of finding check-in/baggage check location*.

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

Attribute Performance



Check-In/Baggage Check

Passengers are most satisfied with check-in at EWR when they use Curbside* or self check-in kiosks

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

EWR	Curbside	Self check-in kiosk	Main counter	Online
Ease of finding check-in/baggage check location	8.42*	7.89	7.57	7.61
Traffic flow at check-in	7.94*	7.21	7.10	7.07
Cleanliness of check-in area	7.95*	7.76	7.38	7.38

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

EWR ranks 19th in
Security Check, scoring
31 points behind SFO

"Continue to offer a dedicated Pre-Check security checkpoint in Terminal A."

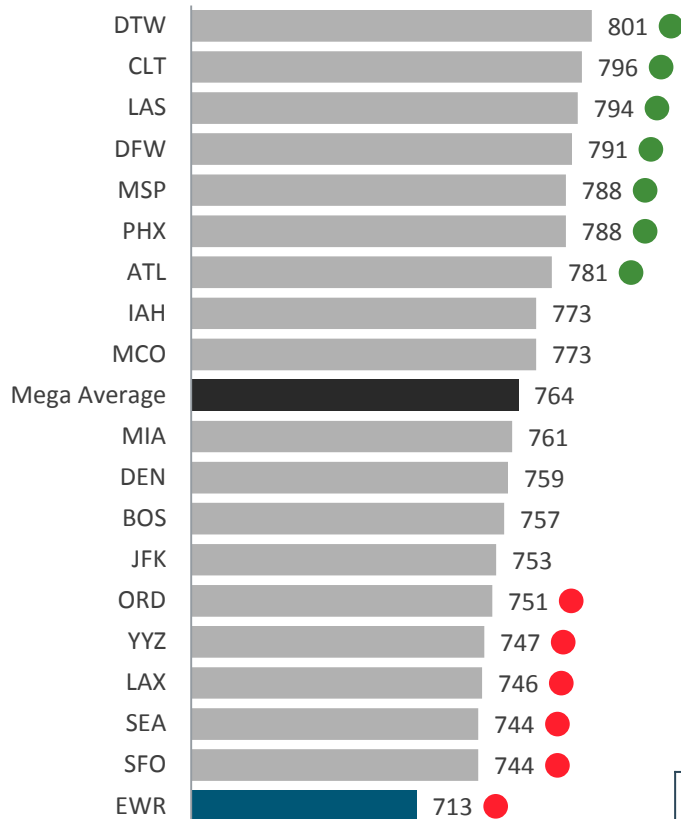
"Better security. Security is extremely sarcastic."

"Utter chaos, takes FOREVER to get through security,"

"Waited 25 min extra at precheck due to cases and cases and cases of orange juice being loaded thru X-ray. Unbelievable that passengers waited excessively at precheck for food service at this time of day. Ridiculous and avoidable but no one used any common sense nor seemed in the least bit concerned. Unbelievable"

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

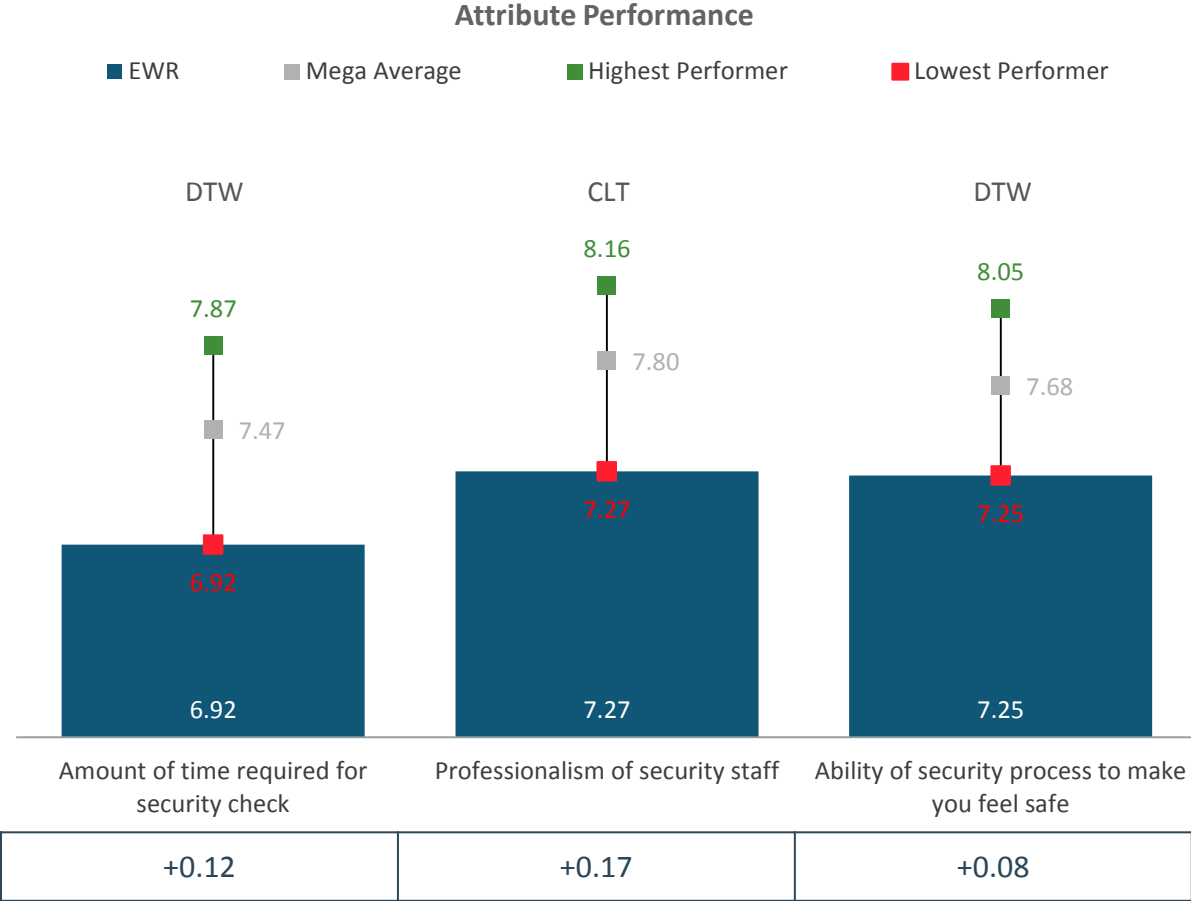
Security Check Index: Mega Airports



+12

Security Check

EWR is the lowest performer in all security check attributes



*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

41% of EWR passengers get through security in 10 mins or less.

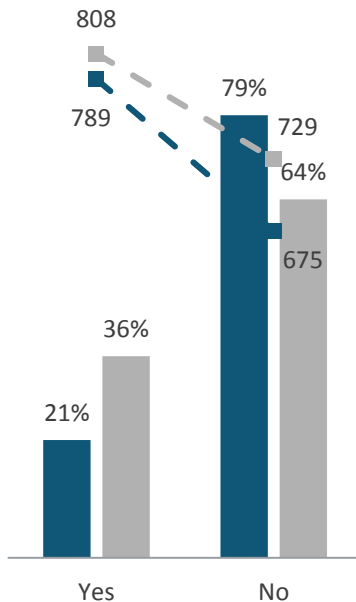
Only 21% of passengers at EWR report seeing signs with security wait times.

*Small sample size (n=30-99); #Insufficient sample size (n<30). Don't know not shown.

Signage to Inform Security Wait Time by Security Check Satisfaction

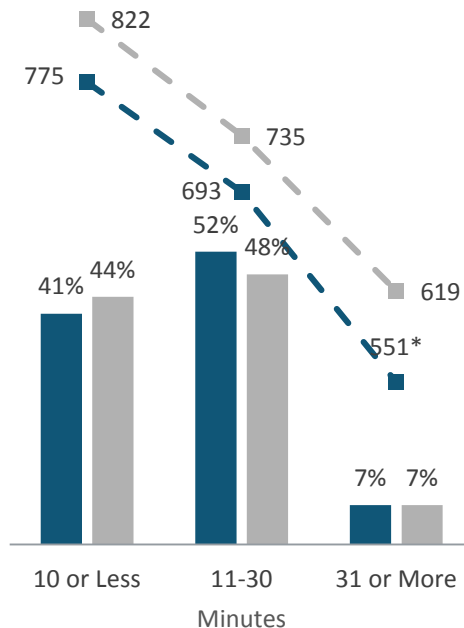
KPI

- EWR
- Mega Average
- EWR Security Check Index
- Mega Average Security Check Index



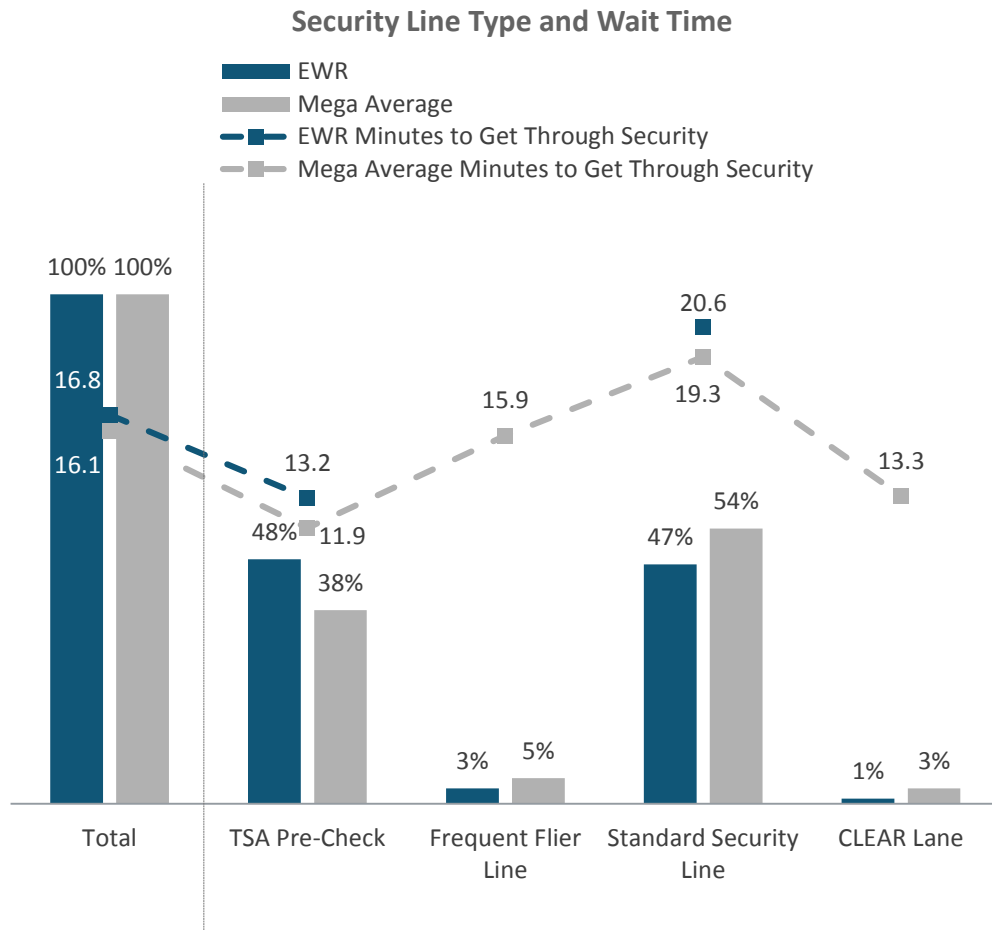
Time to Get Through Security

- EWR
- Mega Average
- EWR Security Check Index
- Mega Average Security Check Index



Security Check

Just as many EWR passengers are using the TSA Pre-Check line as are using the standard security line



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Food/Beverage & Retail Services

Food/Beverage & Retail Services Satisfaction

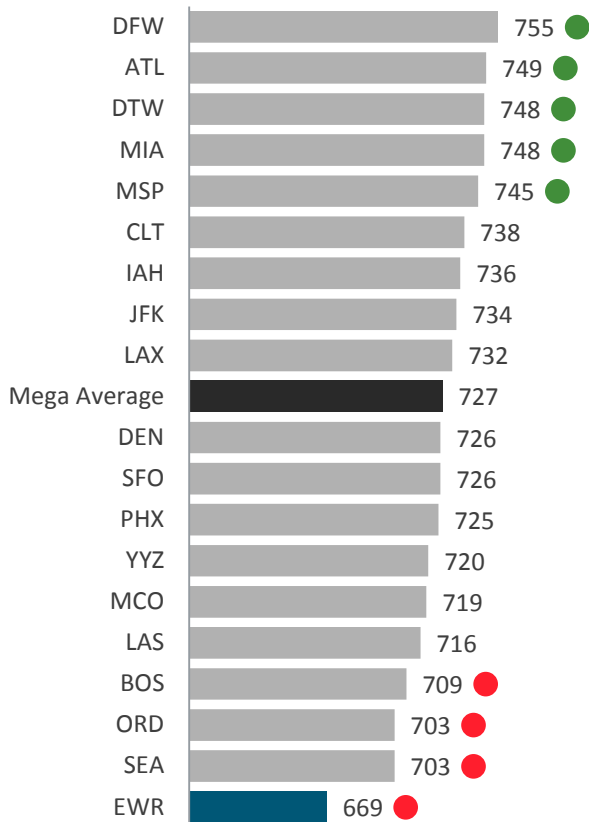
EWR ranks 19th in Food/Beverage and Retail Services, scoring 34 points below SEA

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

- “Coffee”
- “Dunkin Donuts :)”
- “Duty free liquor”
- “Healthy food at reasonable prices, like Freshii etc.”
- “No. On outbound flights I spend time in the United Club where I can get food and drinks free and have comfortable seating.”

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

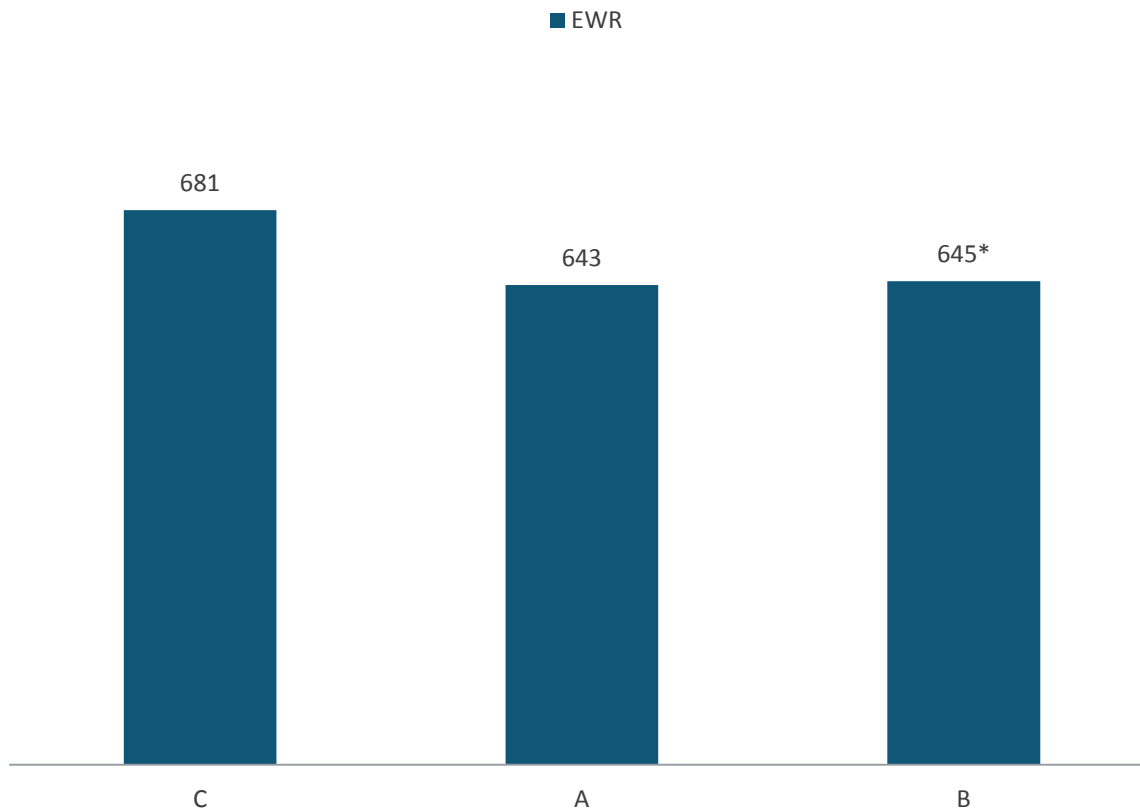
Food/Beverage and Retail Services: Mega Airports



Food/Beverage & Retail Services Satisfaction

Passengers using terminal C are more satisfied than passengers flying out of terminal A in Food/Beverage and Retail Services

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



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

EWR ranks lowest in all Food/Beverage attributes

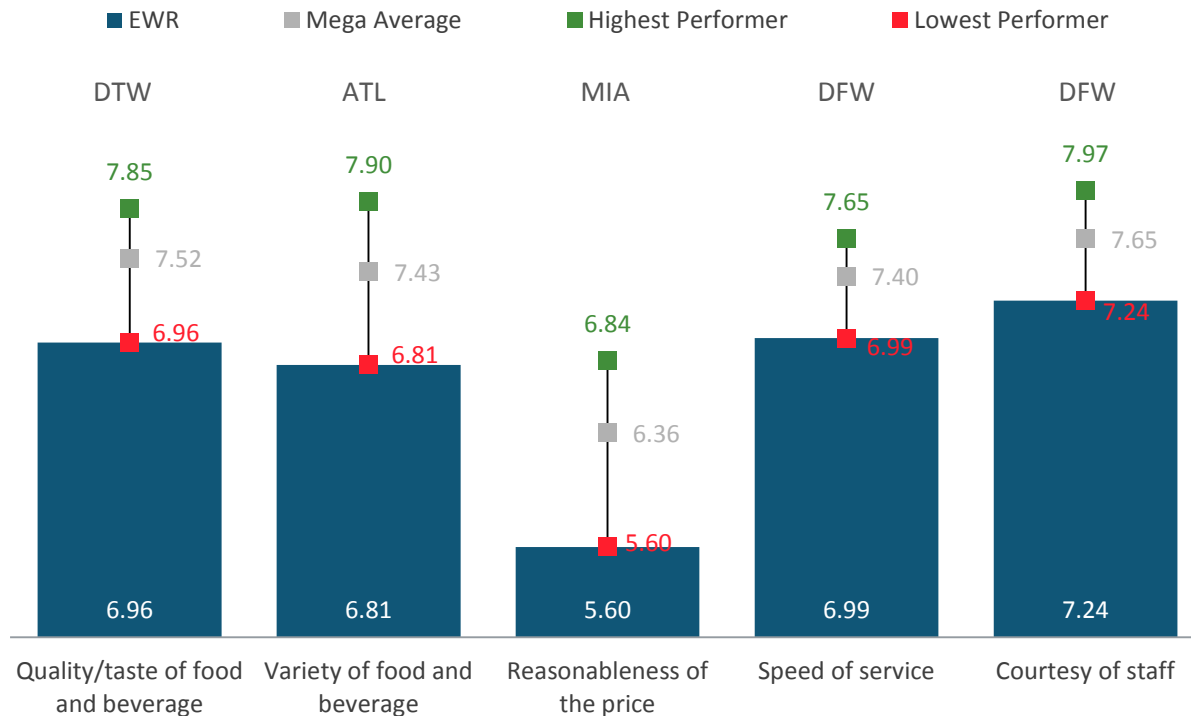
"I believe EWR is making a good effort on improving food experience at airport. Years ago they were very little options now today you have more options to eat and much better healthier options in a more speedy yet relaxed atmosphere."

"bring back the less expensive food options ie nathans, mcdonalds, dunkin donuts"

"Have better food selections after the security gates"

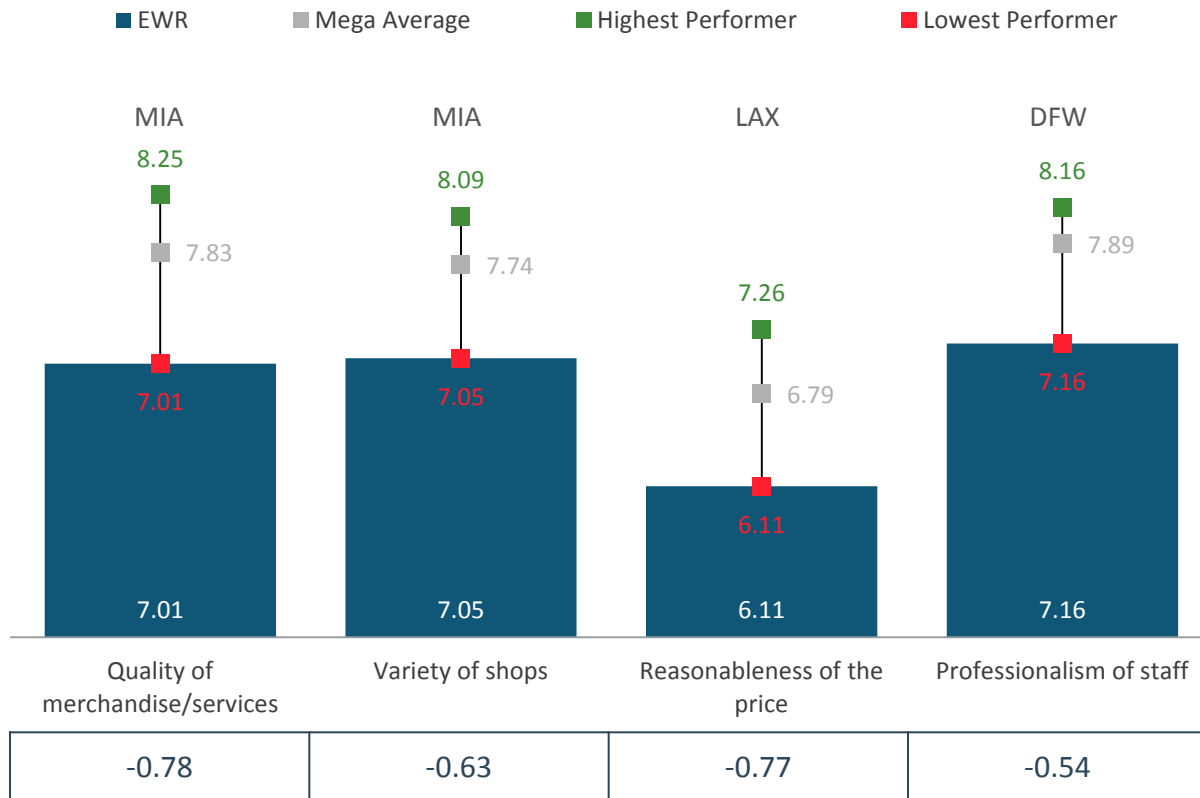
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Attribute Performance – Food/Beverage



EWR scores lowest in all
Retail Services attributes

Attribute Performance – Retail Services



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Food/Beverage & Retail Services

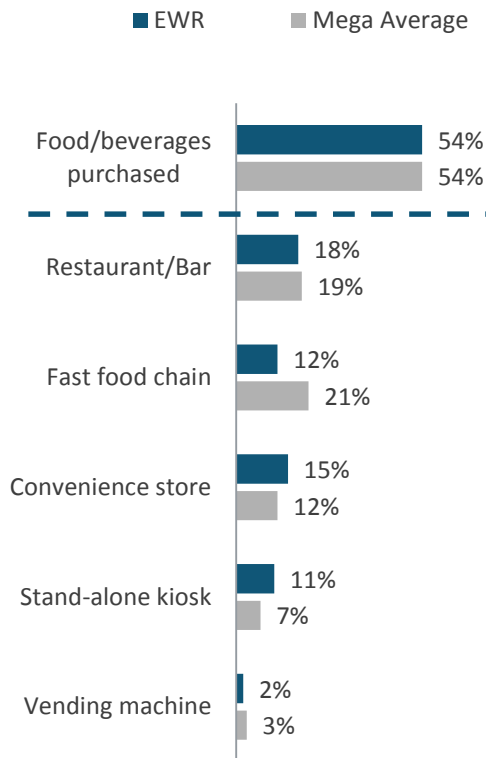
54% of EWR passengers purchase food or beverages

Most EWR passengers purchase food/beverages at restaurants/bars or convenience stores.

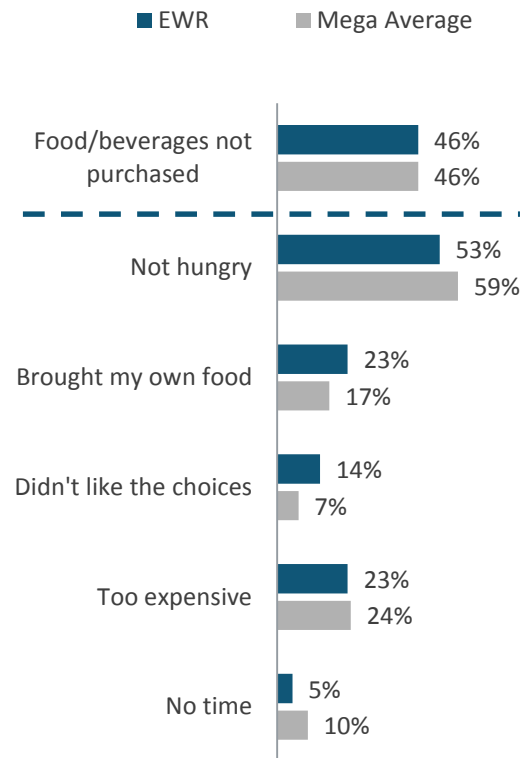
EWR passengers are less likely to purchase at a fast food chain than other Mega airports.

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

Purchase Food and/or Beverages



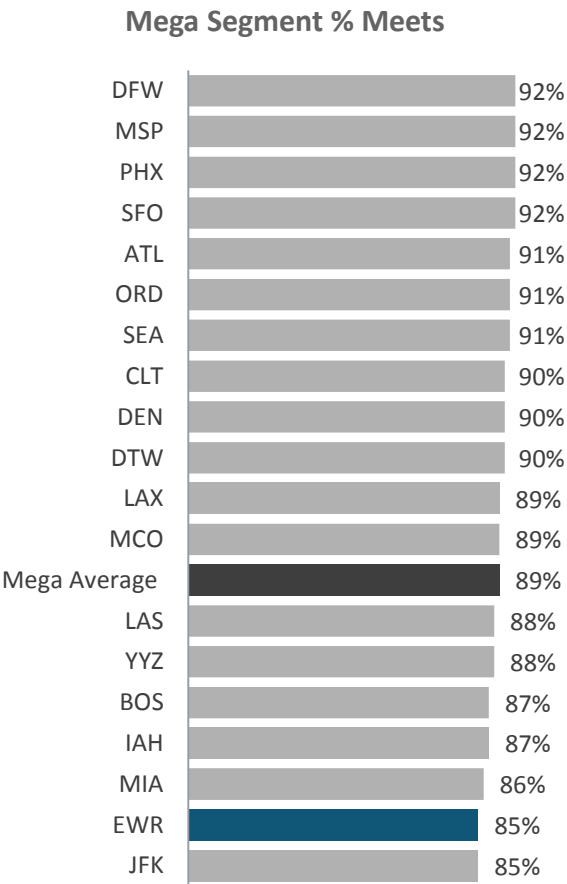
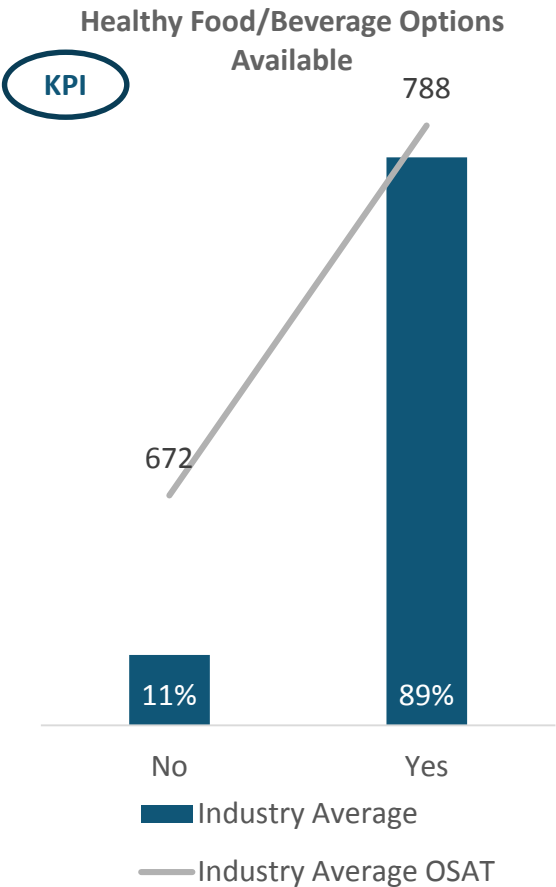
Reason for Not Purchasing



Food/Beverage & Retail Services

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

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

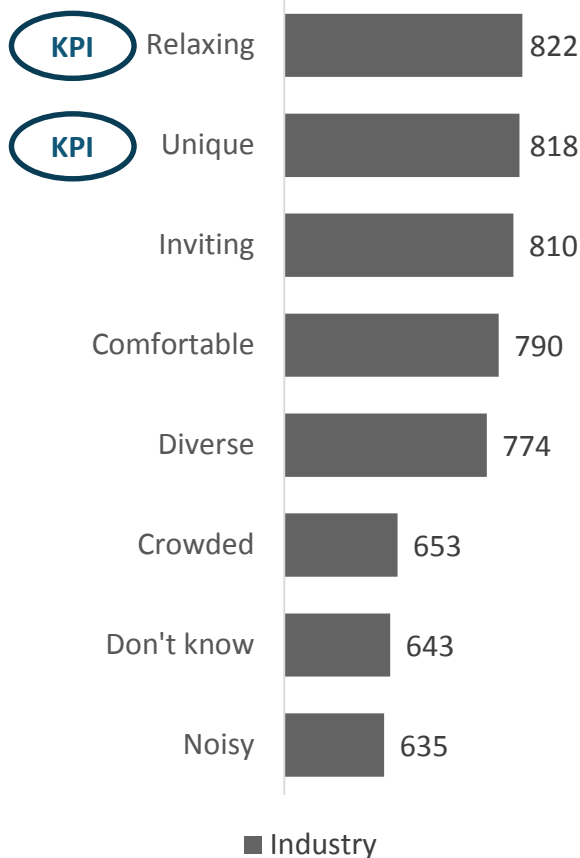


Food/Beverage & Retail Services

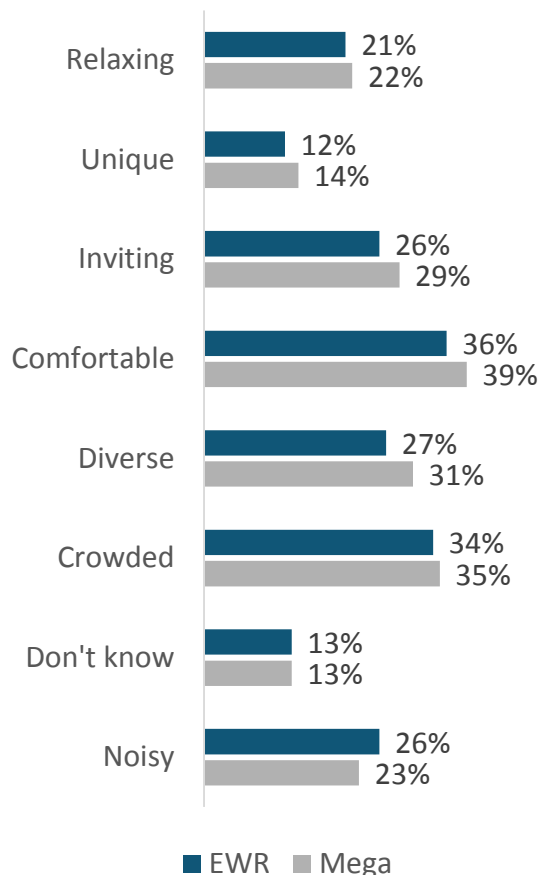
EWR restaurants/bars are described most often as *comfortable* and *crowded*

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...



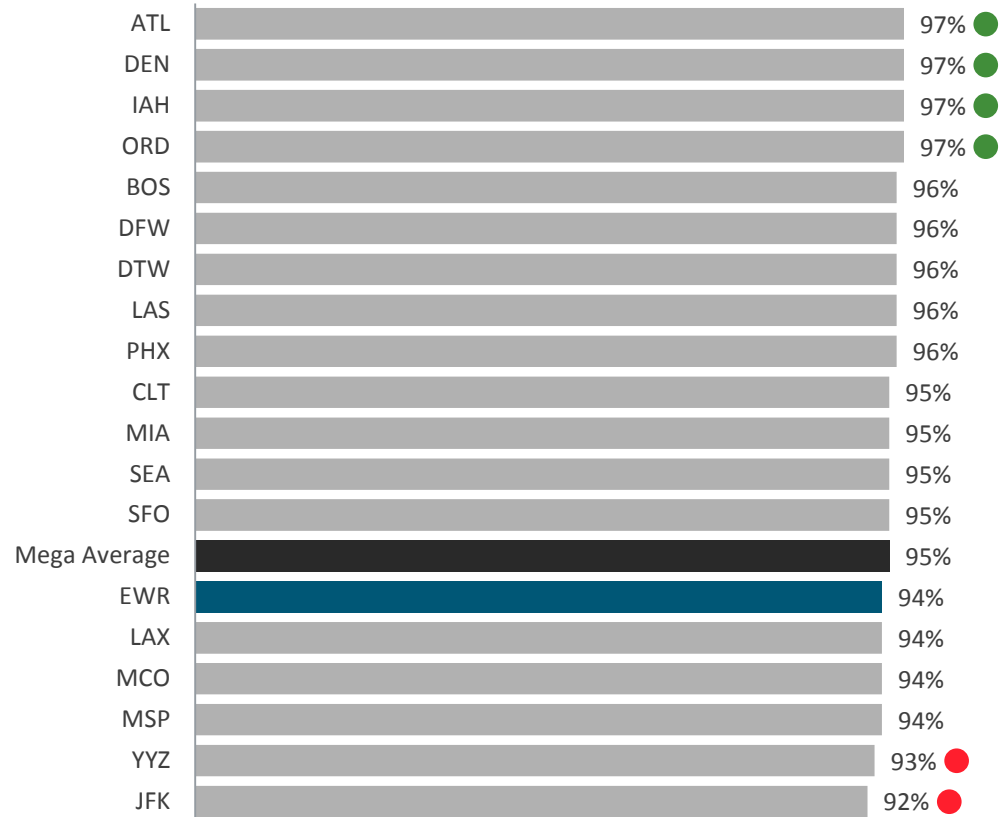
Restaurants/Bars in Terminal Seem...



Food/Beverage & Retail Services

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

Availability of Food & Beverage with Local Flavor: Mega Airports



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



Terminal Facilities

Terminal Facilities Satisfaction

EWR ranks last in
Terminal Facilities,
scoring 31 points behind
LAX

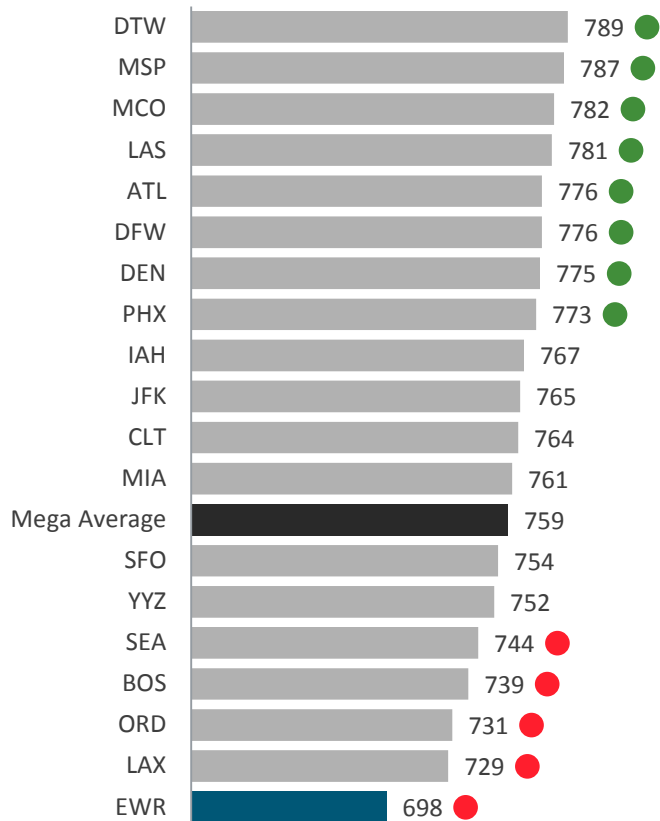
"Announcements are not clear and can be missed, floor in restrooms definitely could be cleaned more often (paper on floor). Water on floor and on sink counters. People working there are rude, unfriendly and not helpful if you have a question."

"Get rid of the center bars. There is limited space to walk a long distance. You took out the moving sidewalks in Terminal C."

"get rid of the fixed chairs at the desks. All chairs need to be movable - the fixed chairs are uncomfortable or unusable by larger people"

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

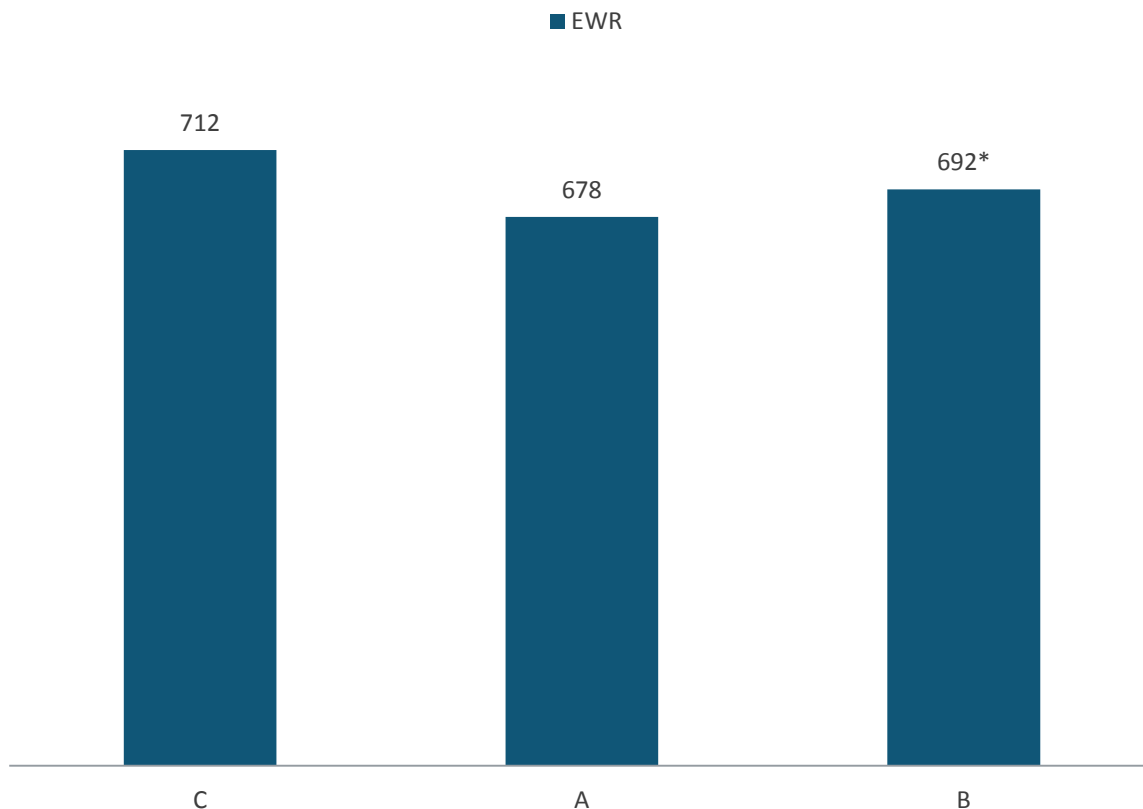
Terminal Facilities Index: Mega Airports



Terminal Facilities

Passengers flying out of terminal C are most satisfied with EWR's Terminal Facilities

Terminal Facilities Index by Terminal for O&D Passengers



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Connecting terminal data not included.

Terminal Facilities

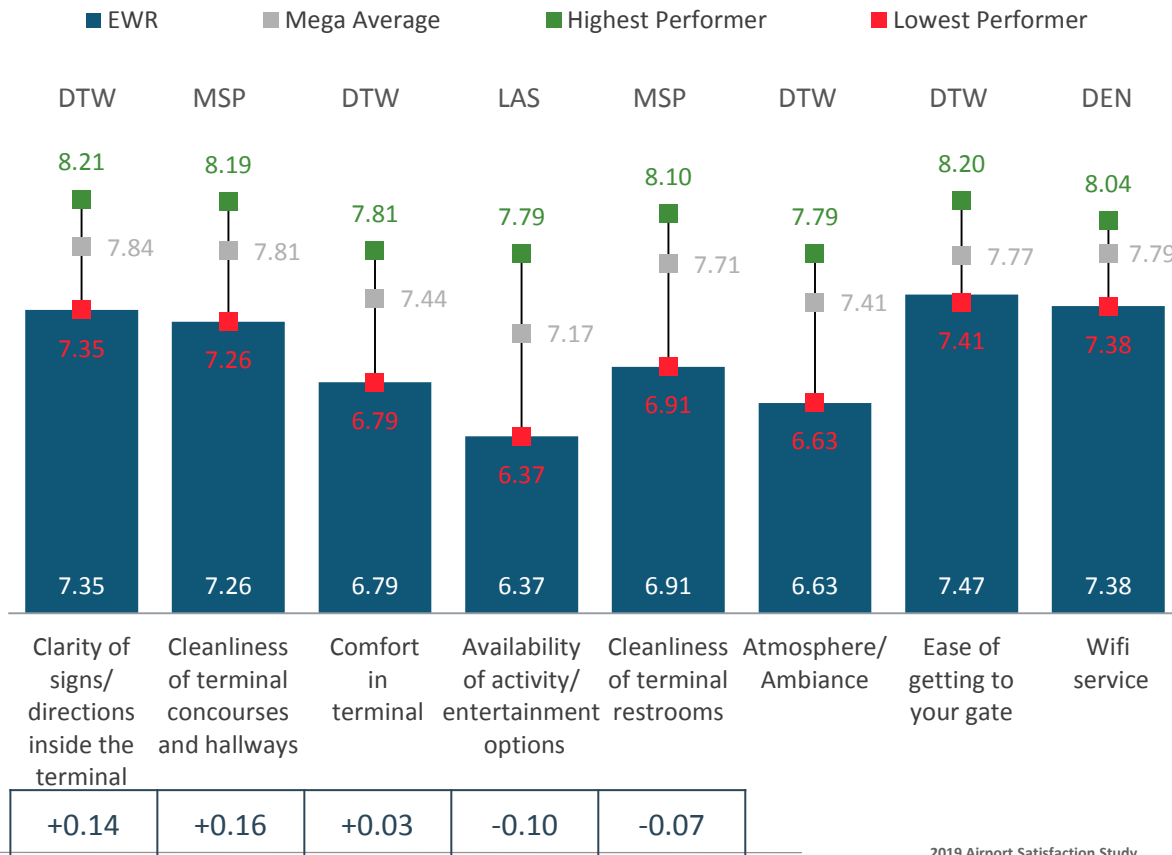
EWR is rated higher in Ease of getting to your gate than ORD

EWR is the lowest performer in the other Terminal Facilities attributes.

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J.D. POWER

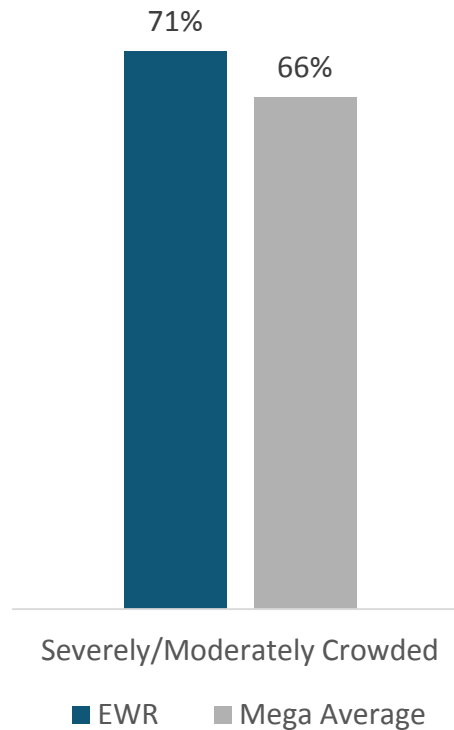
Attribute Performance



Terminal Facilities

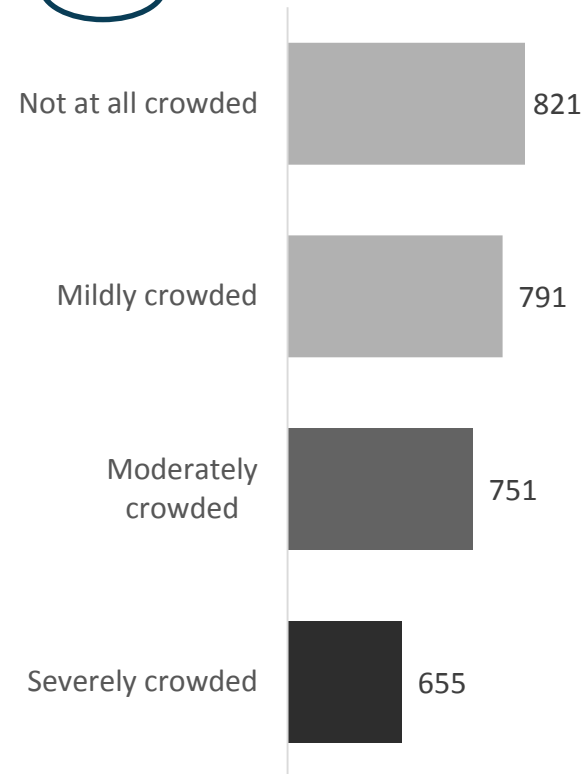
Terminal Facilities satisfaction declines when terminals are perceived as crowded

Crowd Within the Airport Terminal



Terminal Facilities Index by Crowding – Total Industry

KPI



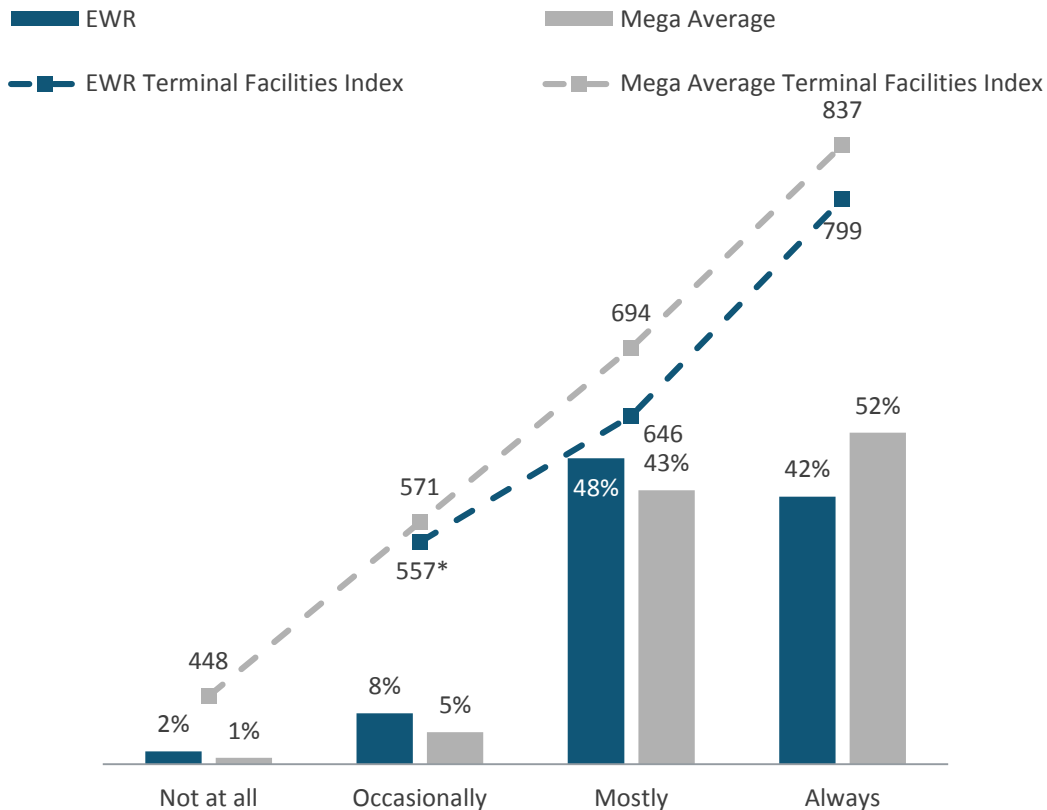
*Small sample size (n=30-99); #Insufficient sample size (n<30).

Terminal Facilities

Easy to understand signage boosts Terminal Facilities Satisfaction

Signage at EWR does not seem to conform completely to the established signs package.

Signage Easy to Understand

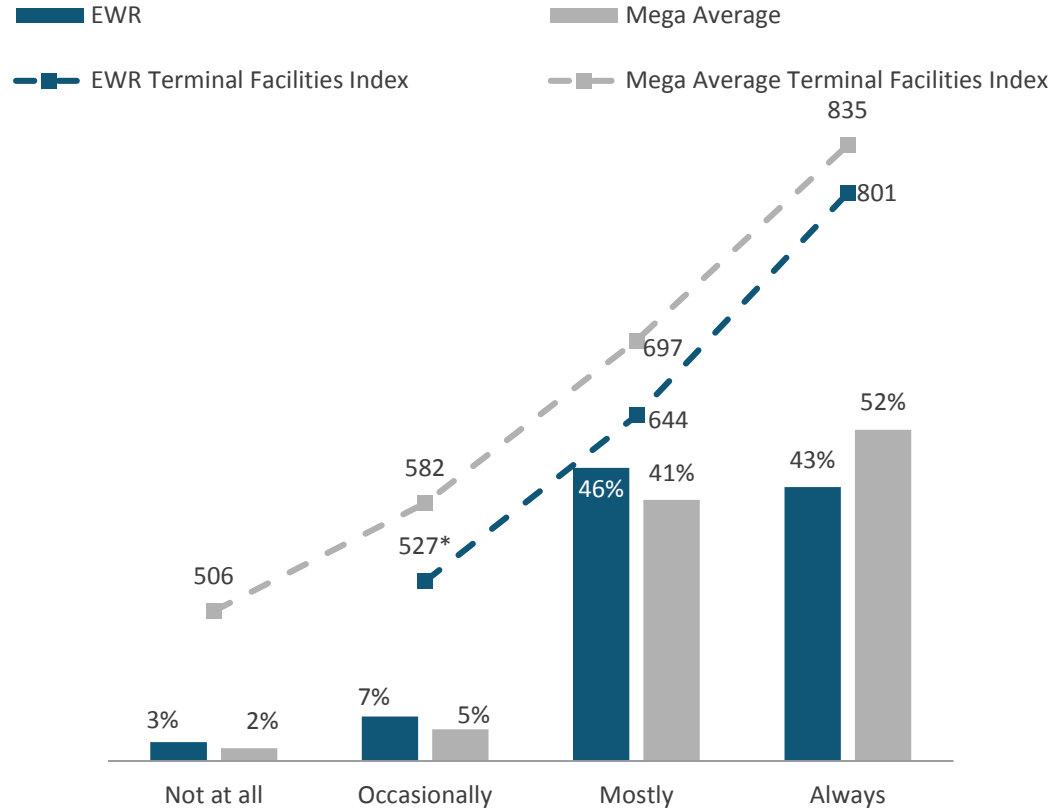


*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30).

Terminal Facilities

Enough signs and directions boost Terminal Facilities Satisfaction

Enough Signs/Directions Throughout Terminal



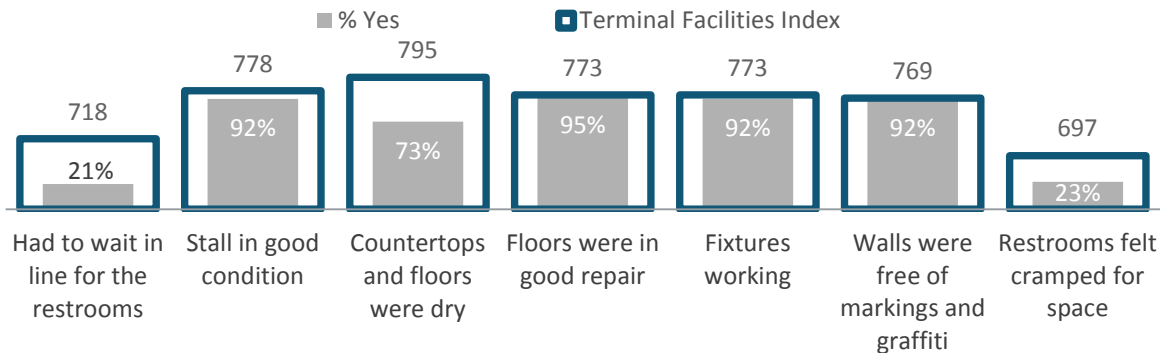
*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30).

Terminal Facilities

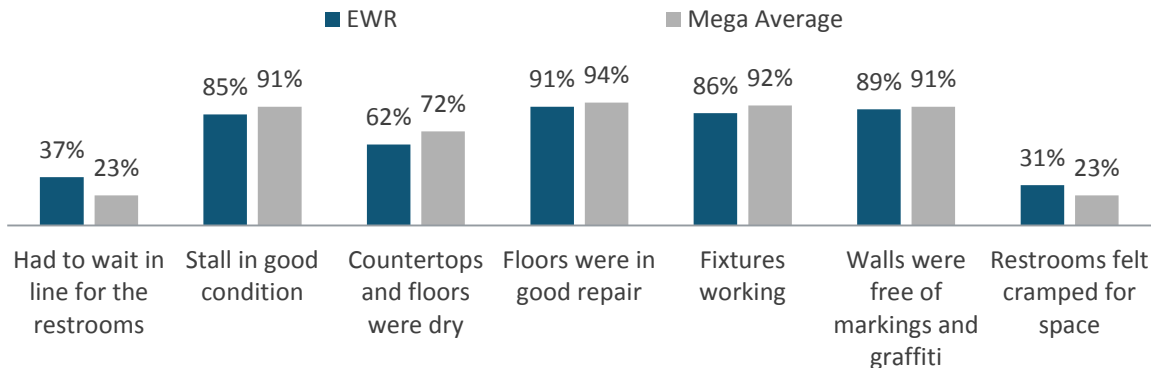
Passenger's perceptions of restroom conditions greatly impact Terminal Facilities Satisfaction

EWR has room to improve restroom wait times and keeping countertops and floors dry. A difficult task when passenger volumes increase as much as EWR's recently.

Restroom Diagnostics by Terminal Facilities Index – Total Industry



Restroom Components – % Yes



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

Terminal Facilities

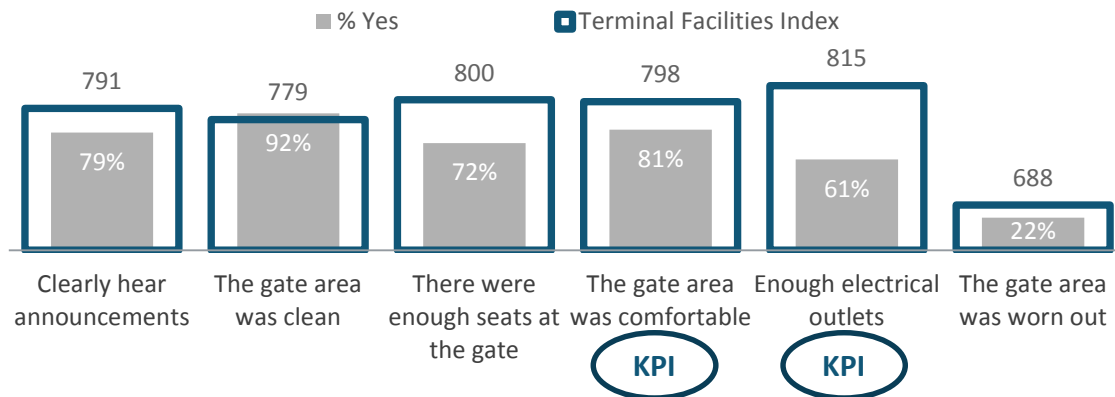
Gate Area Diagnostics – having enough electrical outlets leads to higher Terminal Facilities satisfaction

EWR has room to improve in gate area was comfortable and gate area was worn out.

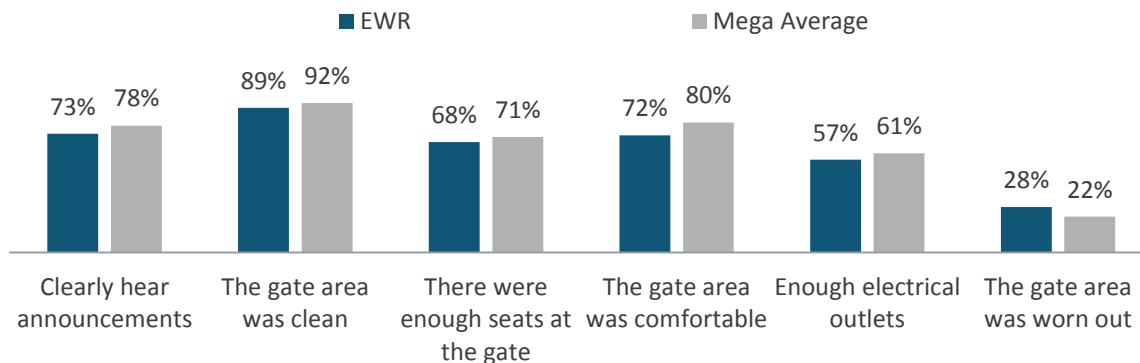
“ALL the charging outlets and terminals were broken.....it was so aggravating. Not to mention, even if they had been working, there were too few of them. There werent enough seats and all the chairs were stained and dirty. I felt disgusting while there.”

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

Gate Area Diagnostics by Terminal Facilities Index – Total Industry



Gate Area Diagnostic Performance

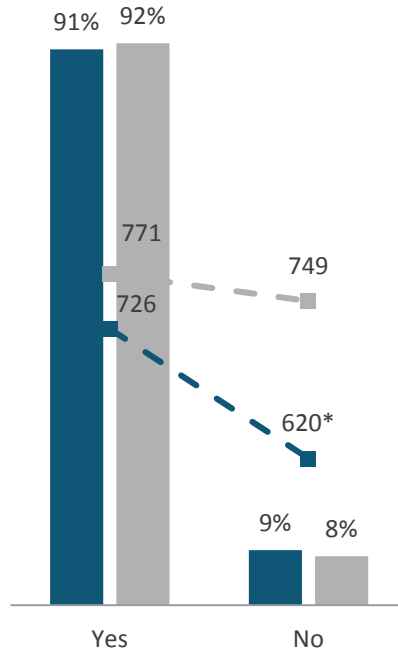
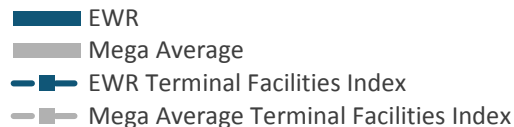


Terminal Facilities

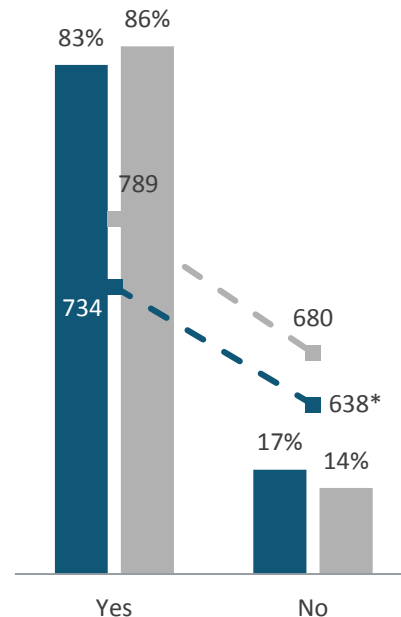
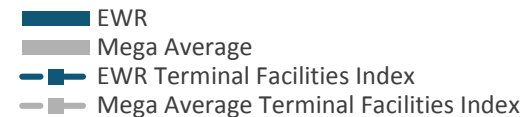
Satisfaction amongst Mega airports is 109 points higher when Wi-Fi is faster or as fast as expected

EWR is on par with wi-fi offerings and speed.

Wi-Fi Connection Offered



Wi-Fi Connection Faster Than or As Expected

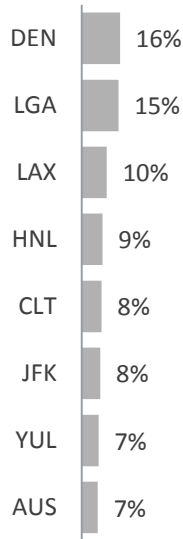


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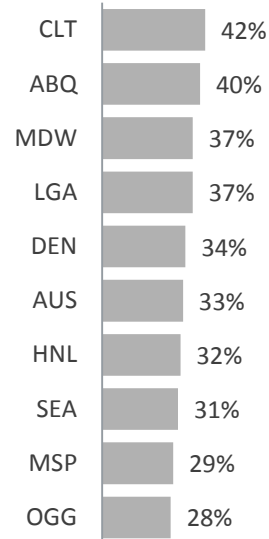
Terminal Facilities

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

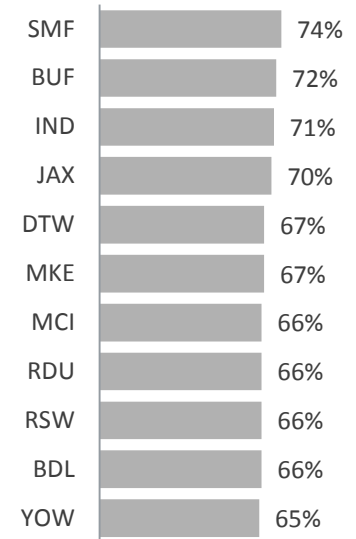
Construction Present and Disruptive or Loud



Construction Present – Did Not Disrupt



No Construction





Baggage Claim

Baggage Claim Satisfaction

EWR ranks 19th in
Baggage Claim, scoring 49
points below BOS

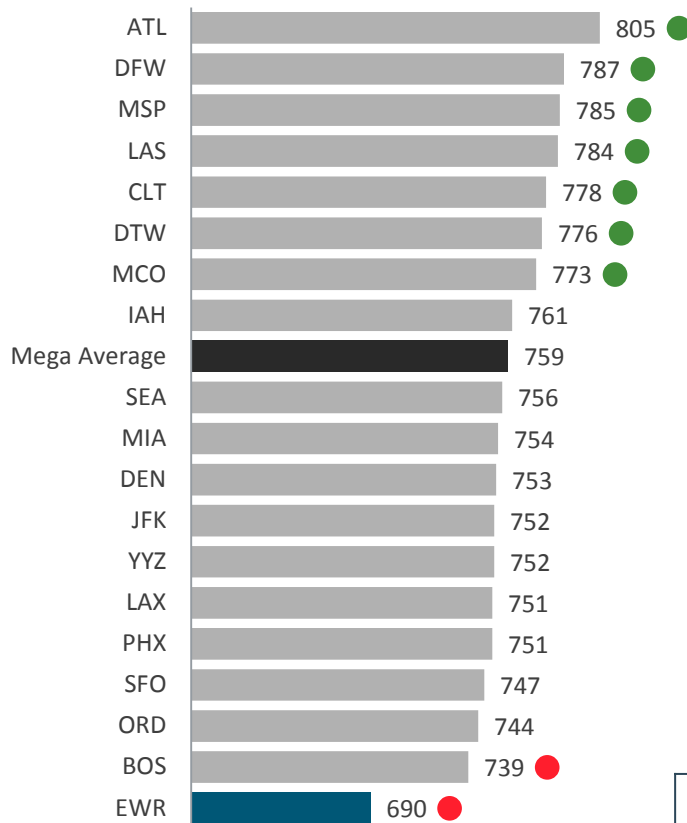
*"Terminal C is clean and up to date, many
restaurants and shops, and plenty of
restrooms. The only downside is it takes
too long to recover baggage."*

*"The baggage claim area is the worst
slowest service "*

*"Takes a long time to get from gate (84)
to baggage claim-especially for 73 year
old..."*

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

Baggage Claim Index: Mega Airports

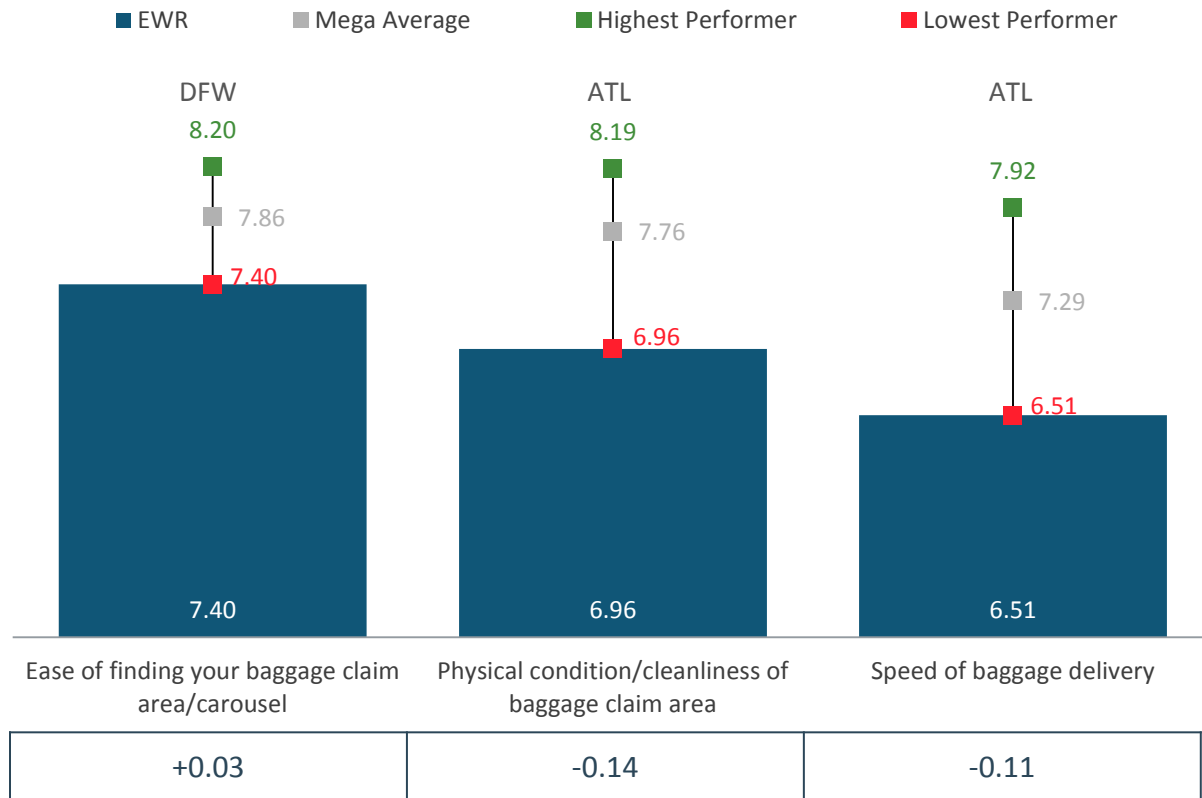


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Baggage Claim

EWR is the lowest performer in all Baggage Claim attributes

Attribute Performance



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

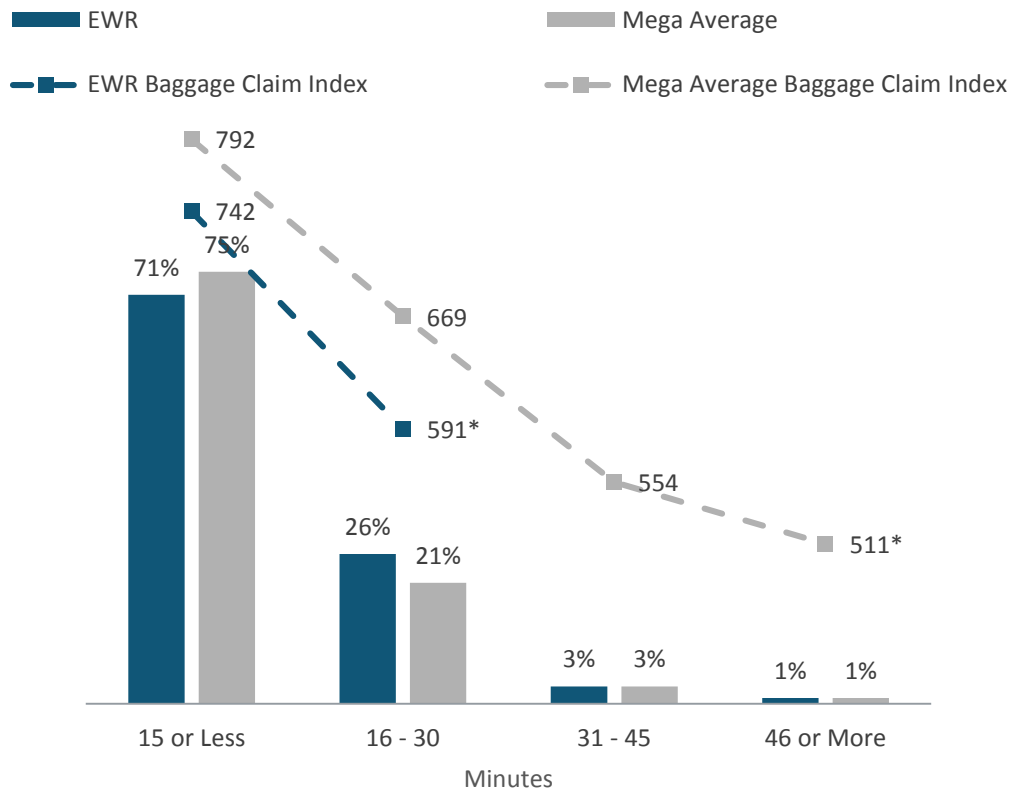
Baggage Claim

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

EWR passengers wait an average of 14 minutes to receive baggage.

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

Wait Time for Baggage and Baggage Claim Satisfaction



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Near Term Actions

Action Items

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

Bring EWR signage up to standard across the airport campus, especially in the parking lots.

Examine improvement to TSA maze “ambiance” and lighting.
Can passengers be pleasantly distracted from the wait?

Bring CLEAR to Terminal C now that UAL has invested in it.

Work with concessionaires to bring lower-cost alternatives to menus to reduce pricing dissatisfaction

Bag Claim times can be improved, other airports have found that the “human element” (e.g., hustle and positive attitudes) yields greatest improvements.

Beyond Measure

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jdpower.com

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