



Airport Performance Report

Second Quarter 2018

PANYNJ Terminal-level Results

August 28, 2018

A Customer Experience Presentation

2018 ACI-ASQ Study Objectives

- ➔ Provide a Customer Satisfaction Evaluation of the airport environment and services provided while customers are at the airport.
- ➔ Provide a Benchmark Comparison for PA Airports to gauge our performance relative to the airport industry.
- ➔ 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 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 300 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.

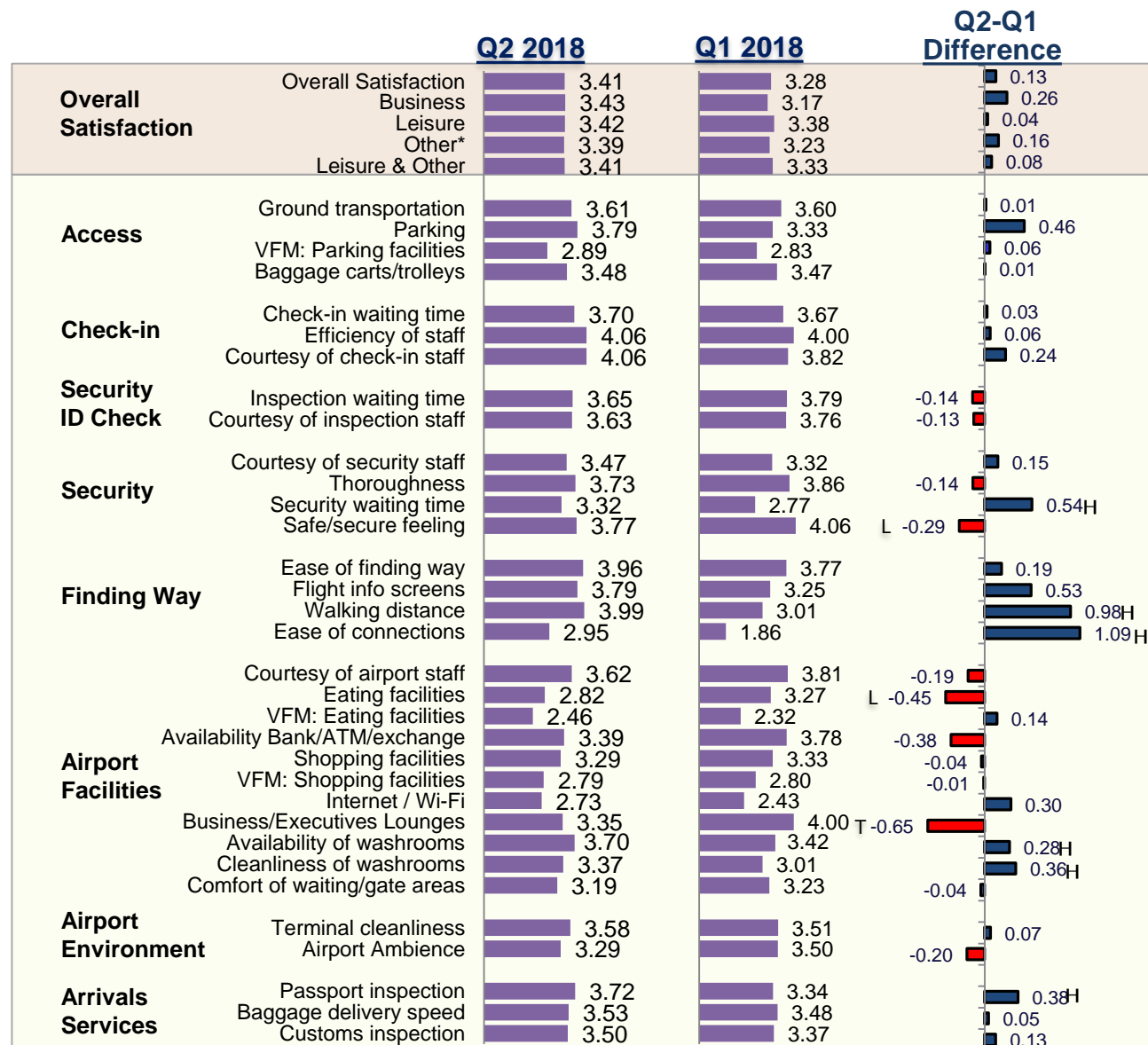
The Satisfaction Rating Attributes

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

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

PA Terminal-level Satisfaction Performance

JFK Terminal 1 Performance



THE PORT AUTHORITY OF NY & NJ

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). Safe/secure feeling at T1 (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.

Compared to men, women rate T1 significantly lower on:

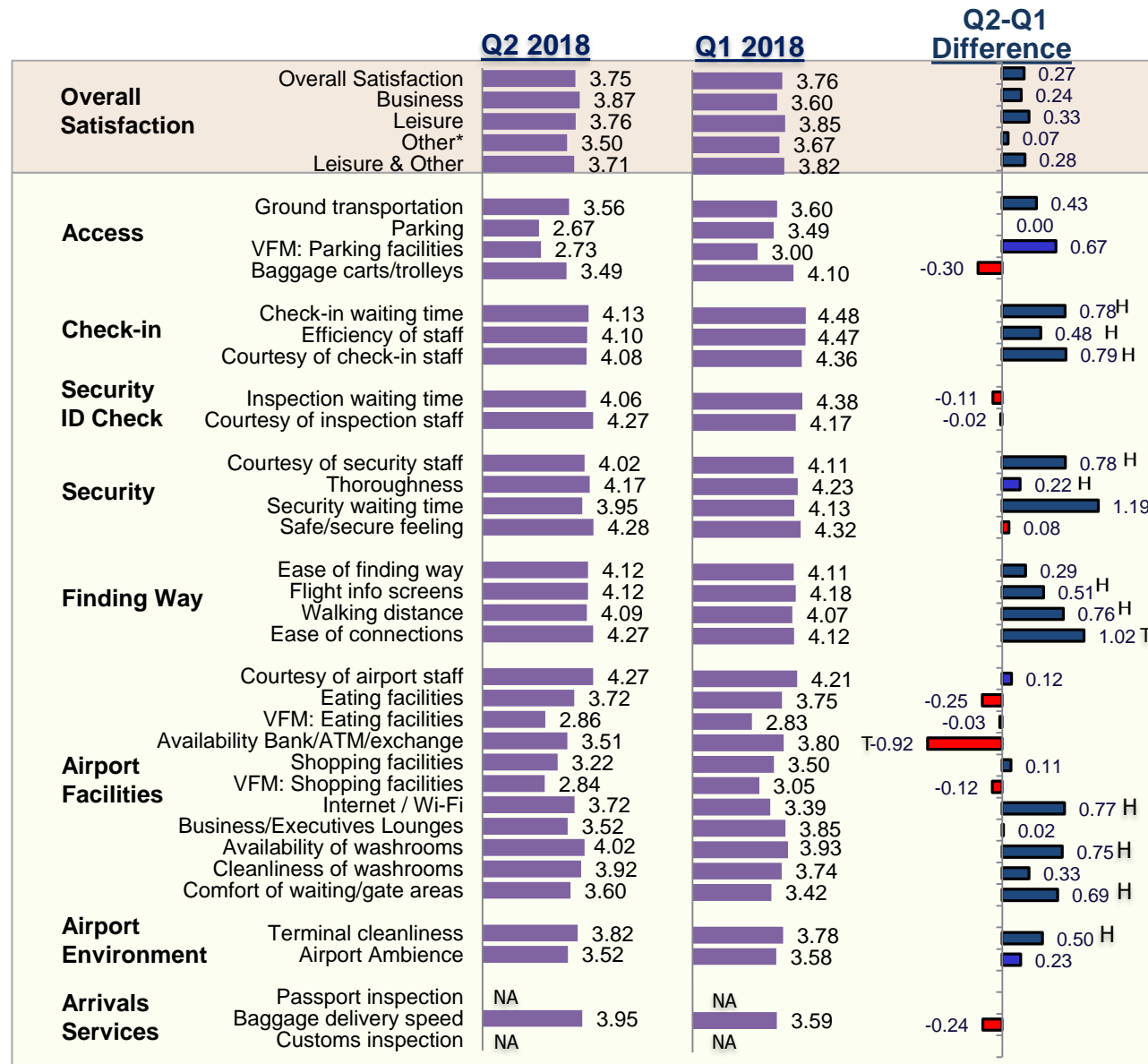
- Check-in wait time (3.42)
- Check-in staff courtesy (3.82)
- TSA courtesy (3.22)
- Thoroughness of Sec. Check (3.49)
- Feeling safe and secure (3.50)
- Sec. Chk. wait time (3.13)
- Internet access/WiFi (2.42)
- Terminal cleanliness (3.37)

Compared to U.S. Citizens, foreign nationals rate T1 significantly higher on:

- Courtesy of TSA staff (3.88)
- Courtesy/helpful airport staff (3.80)
- TSA courtesy (3.22)

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. T: Very small sample base size.

JFK Terminal 2 Performance

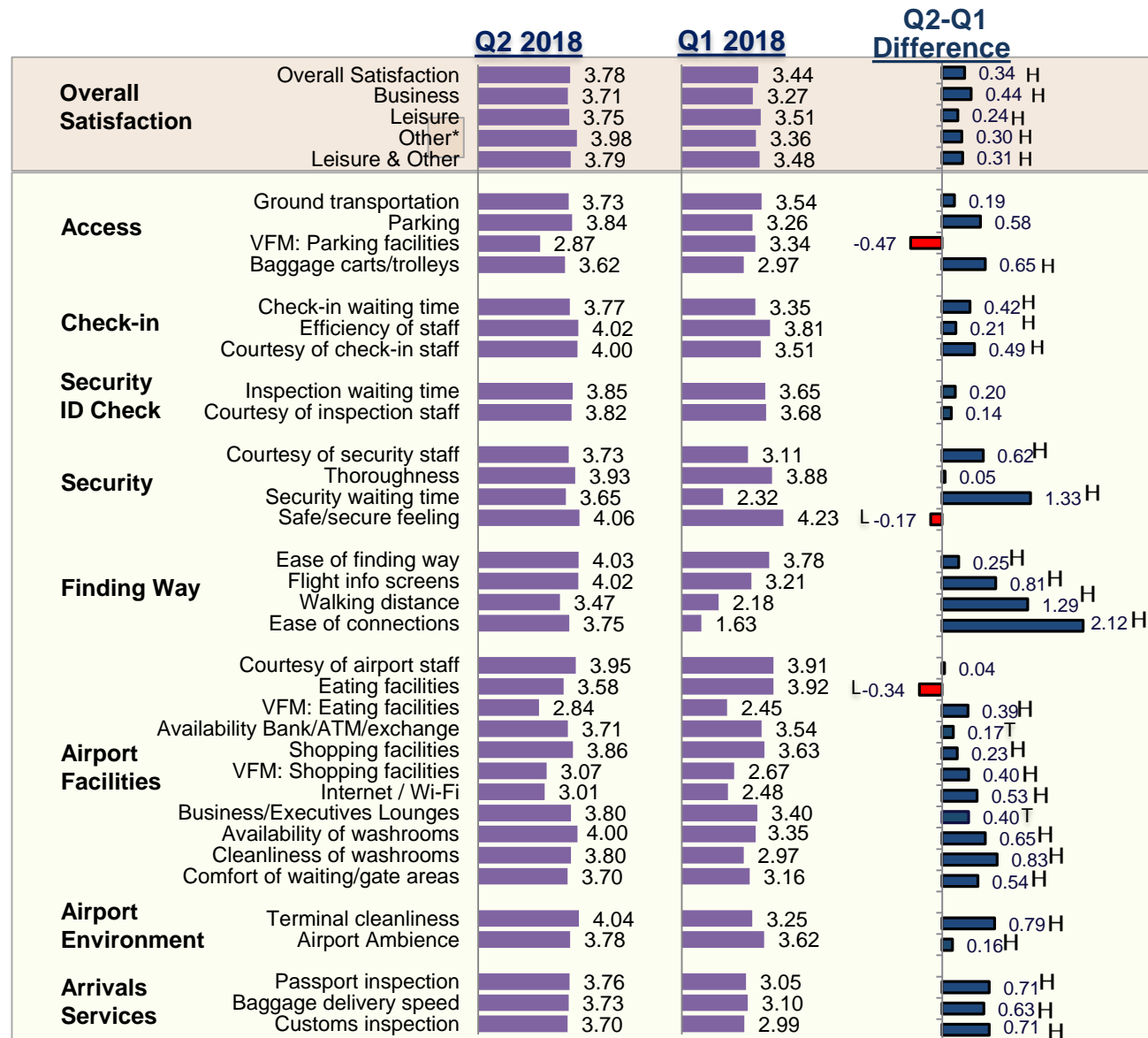


THE PORT AUTHORITY OF NY & NJ

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.

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. T: Very small sample base size.

JFK Terminal 4 Performance



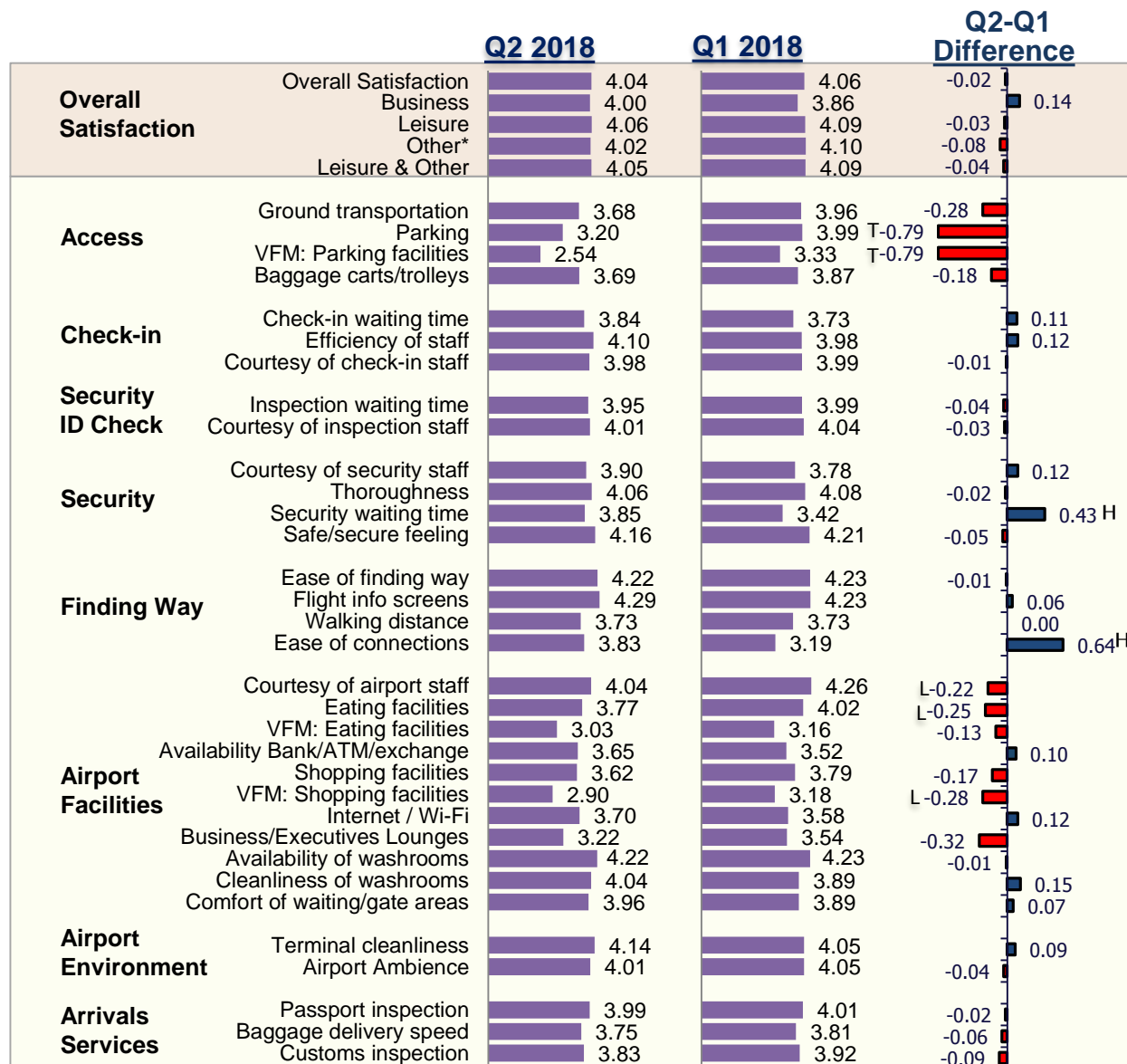
THE PORT AUTHORITY OF NY & NJ

Satisfaction increased significantly overall and for most terminal elements, with the exception of the following elements that score comparably with Q1: all airport access elements (excluding baggage carts); security ID check elements; thoroughness of the security check process; wayfinding; 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 the latter was the highest scoring element. Eating facilities value for the money (VFM) was the lowest scoring element.

- Women rate baggage carts at T4 significantly higher (3.92) than men.
- U.S. residents rate Internet access/ WiFi T4 significantly higher (3.26) than int'l residents.
- Leisure travelers rate availability of ATMs/money exchanges at T4 significantly higher (3.86) than business travelers.
- Local O-D passengers rate the check-in wait time at T4 significantly higher (3.85) than connectors.
- Connectors rate arrival passport control and customs inspections significantly higher (both 4.02) at T4 than local O-D passengers.
- Connectors also rate TSA staff courtesy/helpfulness significantly higher at T4 (3.97) than O-D passengers.

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. T: Very small sample base size.

JFK Terminal 5 Performance



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).

Connectors rate availability of restrooms significantly higher at T5 (4.44) than local O-D passengers.

Men rate the following significantly higher at T5 than women:

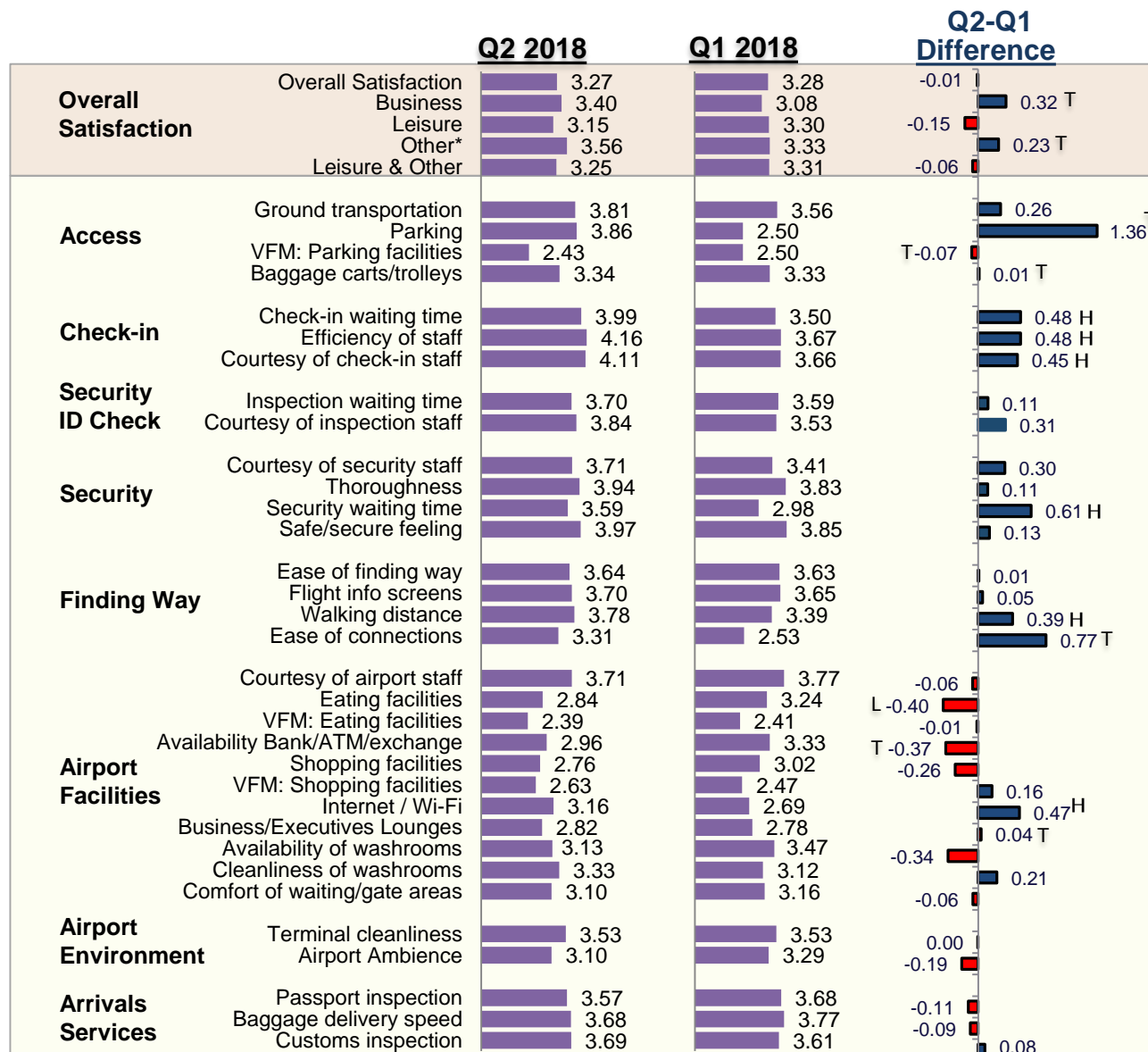
- Overall satisfaction (4.22)
- Ground transportation to/from airport (4.00)
- Restroom cleanliness (4.22)

Foreign residents rate the following significantly higher than U.S. residents:

- Feeling safe and secure (4.41)
- Arrival passport inspection (4.32)
- Arrival baggage delivery speed (4.21)
- Arrival Customs inspection (4.30)

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. T: Very small sample base size.

JFK Terminal 7 Performance



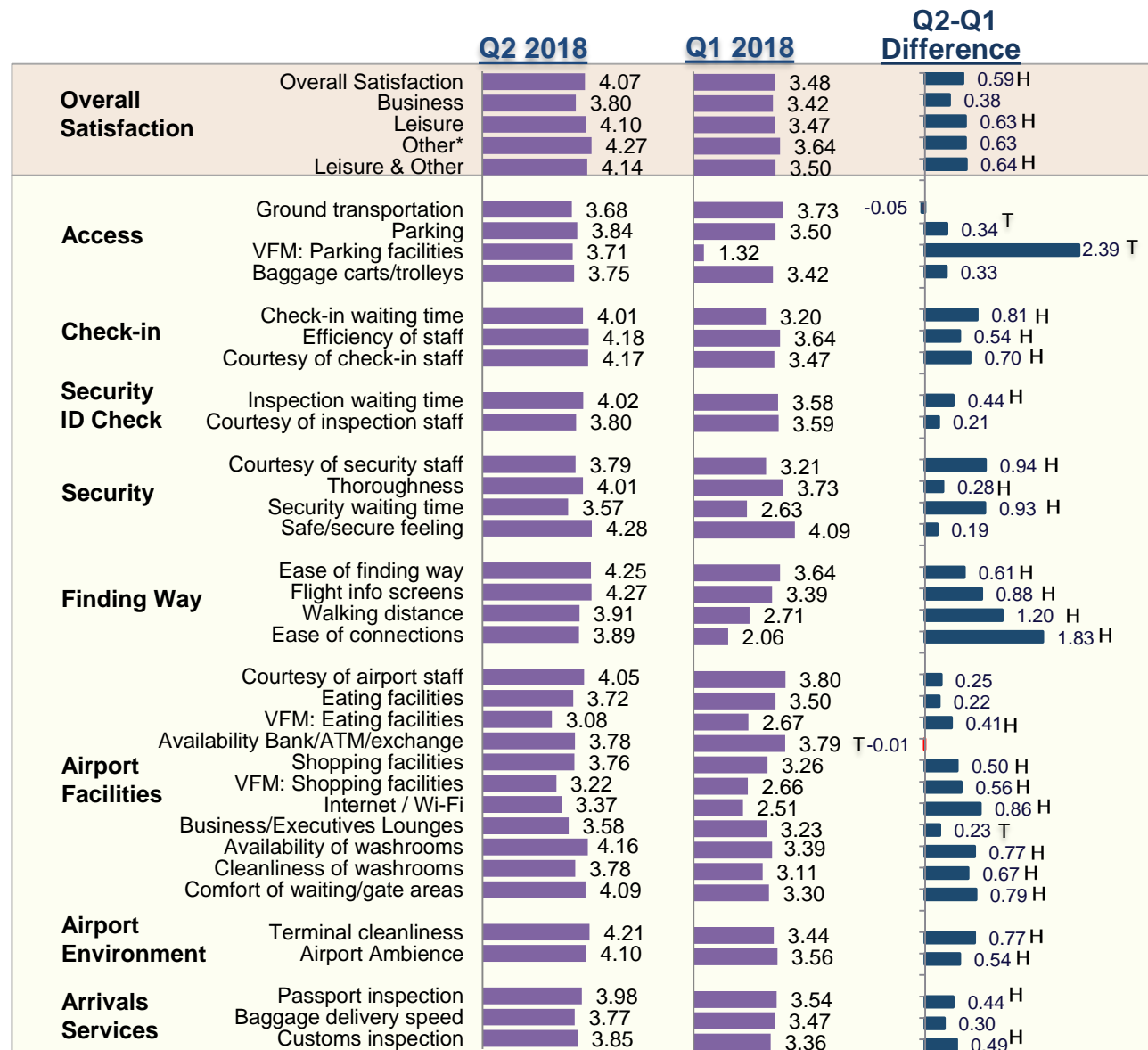
Satisfaction remained stable overall and on many terminal elements, while it improved significantly in satisfaction with all check-in elements (check-in staff efficiency - 4.16, was the highest scoring element), security wait time (3.59), walking distance (3.78) and Internet access/WiFi (3.16). Satisfaction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

Compared to U.S. residents, foreign residents rate T7 significantly lower on:

- Courtesy of TSA staff (3.64)
- On arrivals Passport inspection process (3.32)

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. T: Very small sample base size.

JFK Terminal 8 Performance



THE PORT AUTHORITY OF NY & NJ

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).

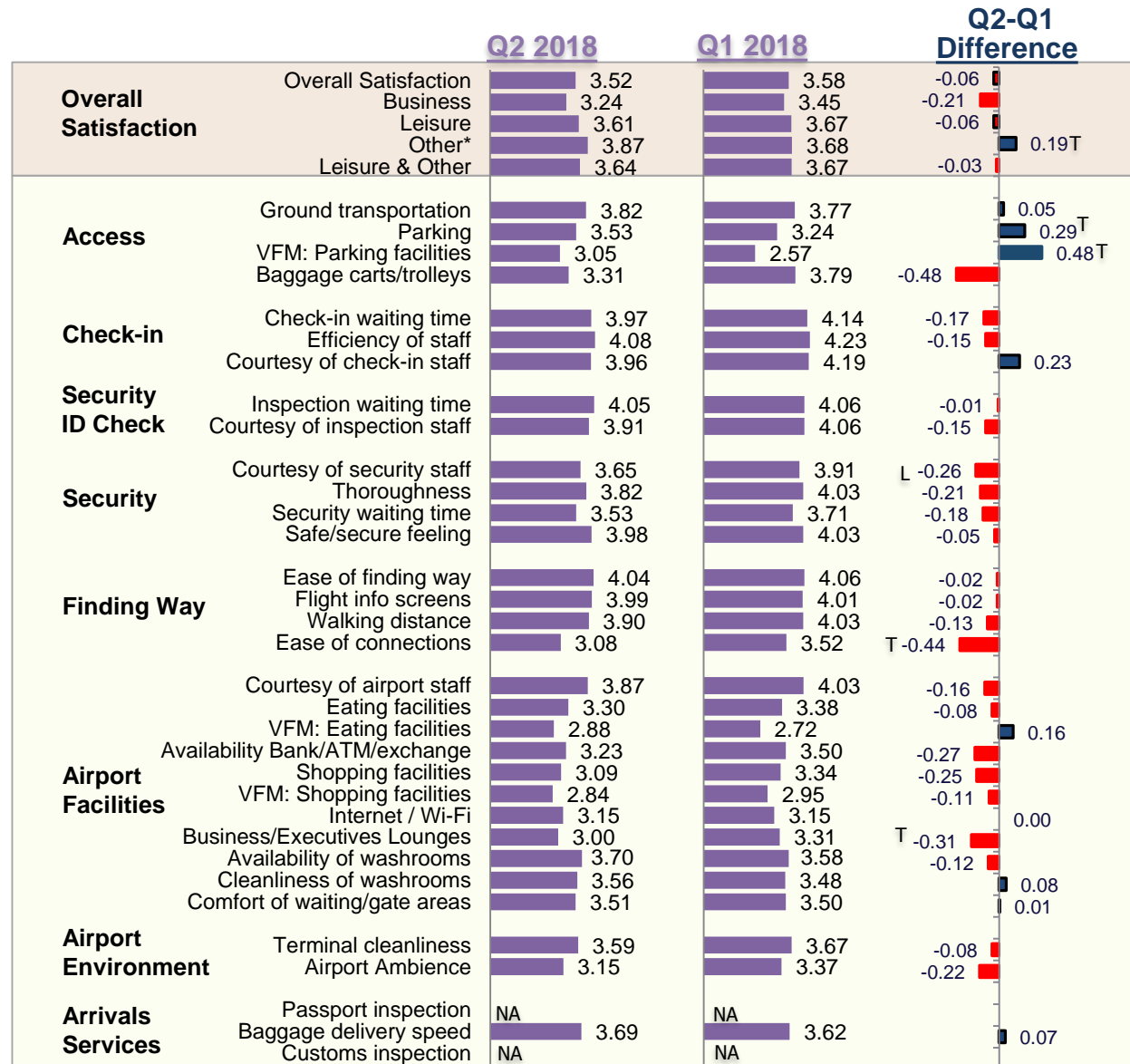
Compared to business travelers, leisure travelers rate T8 significantly higher on: overall satisfaction (4.14); ground transportation to/from airport (3.86); parking facilities (3.95) and its VFM (3.87); Internet access/WiFi (3.52); comfort of gate area (4.17); restroom cleanliness (4.32); and terminal ambience (4.21).

Women rate ground transportation at T8 significantly higher (3.92) than men (3.32).

Int'l residents rate T8 significantly higher on parking facilities (5.00) and arrivals speed of baggage (4.02), than U.S. residents. Foreign nationals rate T8 significantly higher on ground transportation to/from airport (3.95), parking facilities (4.72), eating facilities (3.90) and ATMs/money exchanges (4.07) than U.S. Citizens,

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. T: Very small sample base size.

EWR Terminal A Performance



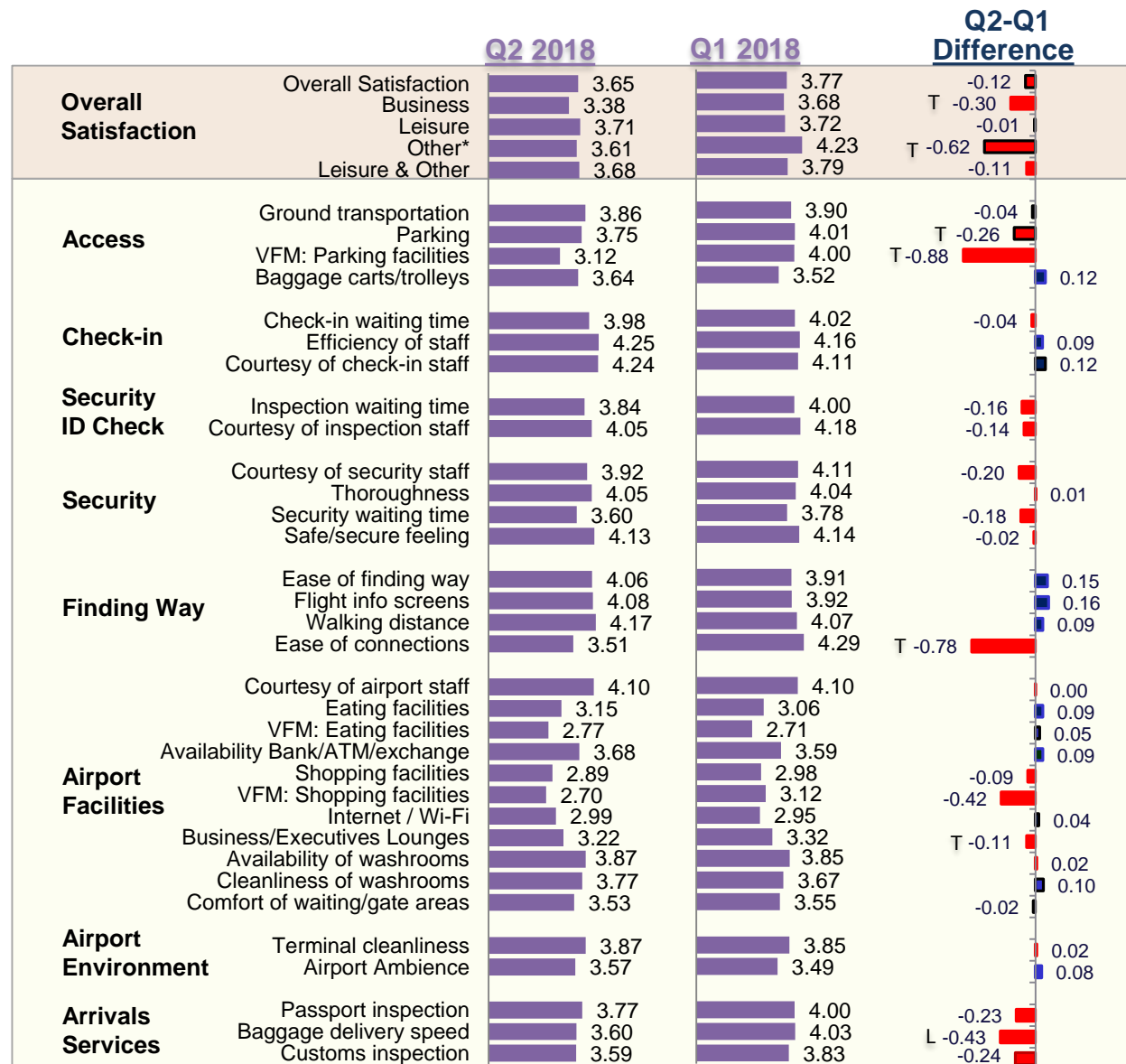
There was no significant improvement in satisfaction overall at TA in Q2, nor in any of the terminal elements, moreover, TSA courtesy (3.65) receded significantly. Terminal A scored highest in satisfaction on check-in staff efficiency (4.08) and lowest on shopping facilities VFM (2.84).

Leisure travelers rate TA significantly higher than business travelers on overall satisfaction (3.64); Check-in wait time (4.14); TSA courtesy (3.79); Security Check wait time in line (3.77); gate comfort (3.68); restroom cleanliness (3.71); and terminal ambience (3.31).

Women rate TA significantly higher than men on overall satisfaction; Check-in airline agent courtesy (4.19); eating places (3.53); availability of ATMs/money exchanges (3.70); gate comfort (3.75); restroom cleanliness (3.79); and terminal ambience (3.37).

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. T: Very small sample base size.

EWR Terminal B Performance



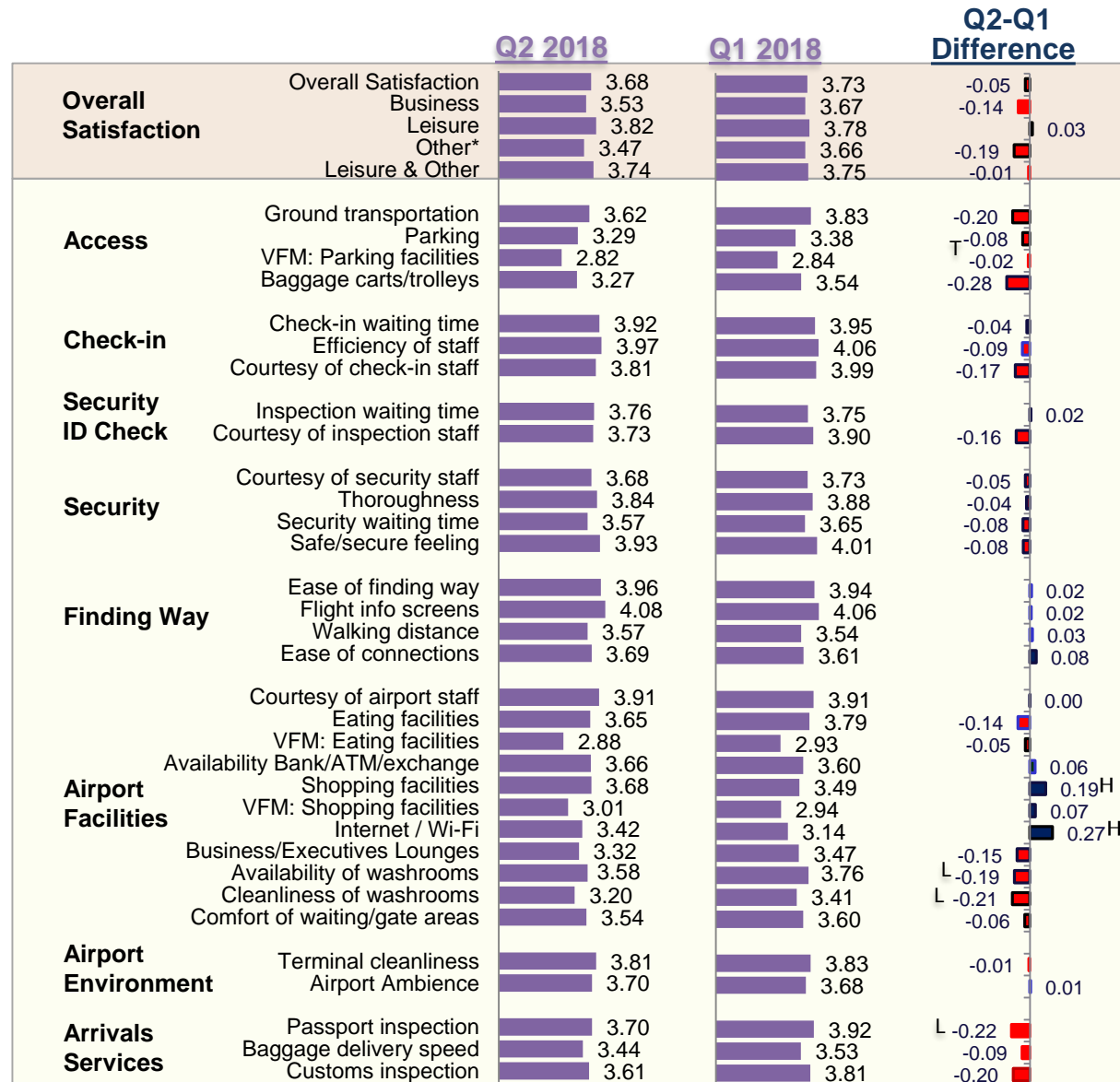
Satisfaction remained stable overall and on nearly all terminal elements, except for a significant decline in arrivals baggage speed (3.60). Check-in staff efficiency was the highest scoring satisfaction element (4.25), while shopping facilities VFM was the lowest scoring satisfaction element (2.70).

Domestic travelers rate TB significantly higher than int'l travelers on:

- Overall satisfaction (3.93);
- Security Check wait time (4.46);
- TSA ticket checker courtesy/helpfulness (4.53);
- TSA courtesy/helpfulness (4.23);
- Thoroughness of process (4.36);
- TSA wait time (4.17);
- Wayfinding (4.34);
- FIDS (4.40);
- Walking distance in terminal (4.40);
- Airport staff courtesy (4.35);
- Eating places (3.76);
- Eating places VFM (3.12);
- ATMs/money exchanges (4.30);
- Business lounges (4.11);
- Gate comfort (3.79);
- Terminal ambience (3.89);
- Arrivals Passport inspection (4.31);
- Arrivals speed of baggage (3.93);
- and
- Customs inspection (4.21).

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. T: Very small sample base size.

EWR Terminal C Performance



THE PORT AUTHORITY OF NY & NJ

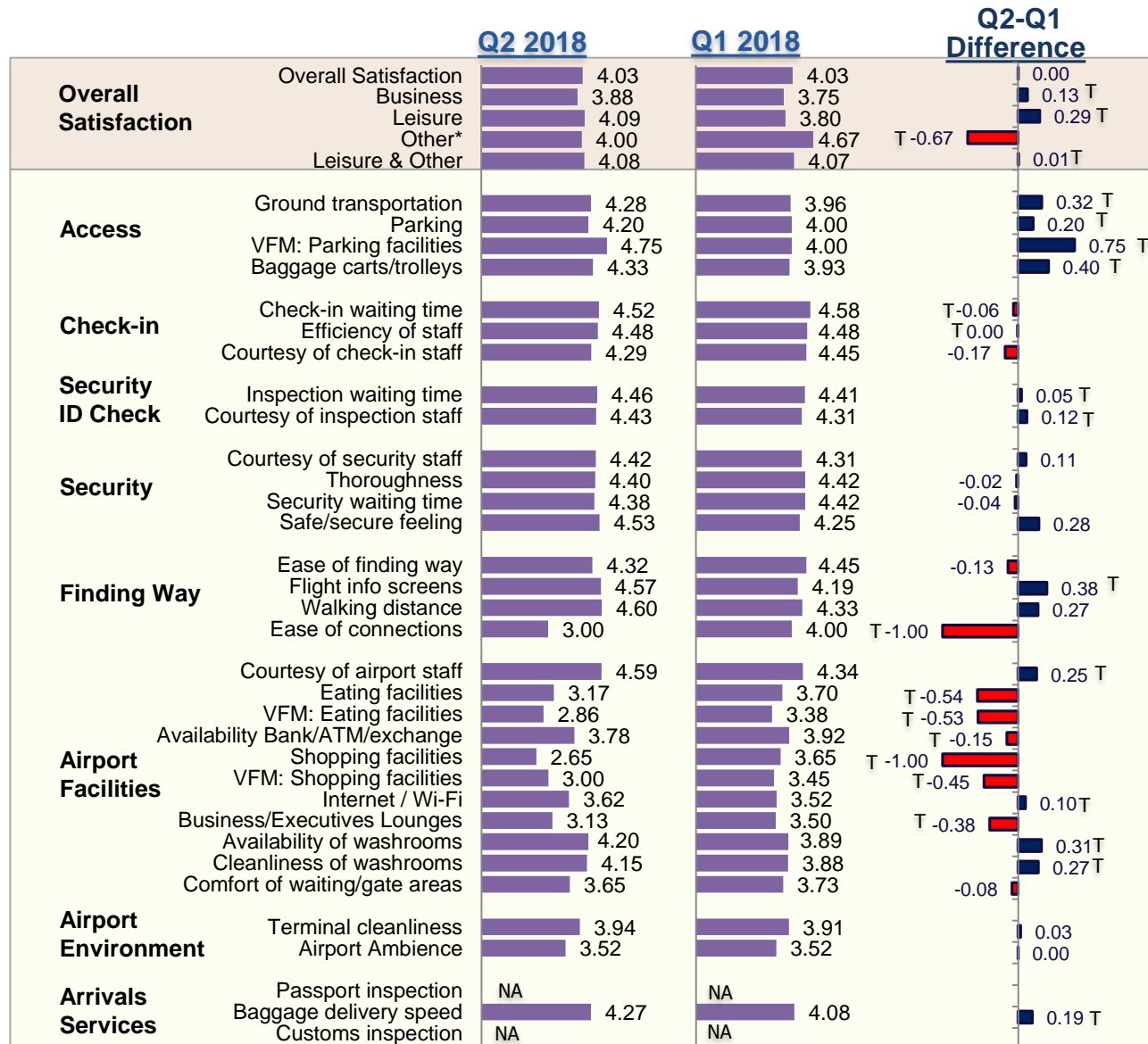
Satisfaction remained stable overall, as did nearly all the terminal elements, except for a significant improvement in satisfaction with shopping facilities (3.68) and Internet access/WiFi (3.42), while experiencing a significant decline in satisfaction with restroom availability (3.58) and arrivals passport inspection process (3.70). It scored highest on FIDS (4.08) and lowest on parking facilities VFM (2.82).

Int'l passengers rate TC significantly higher than domestic passengers on: overall satisfaction (3.90); parking facility VFM (3.89); Check-in wait time (4.20); airline agent efficiency (4.18) and courtesy (4.08); Sec. Check wait time (4.00); TSA ticket checkers (4.03) and other TSA staff (3.90); safe and secure feeling (4.12); wayfinding (4.20); FIDS (4.25); walking distance in terminal (3.76); ease of connections (3.94); airport staff courtesy (4.09); availability of restrooms (3.76); restroom cleanliness (4.05); terminal ambience (3.97); arrivals Passport inspection (3.94); and arrivals baggage speed (3.73).

Leisure travelers rate TC significantly higher than business travelers on: overall satisfaction (3.74); airline Check-in agents courtesy (3.91); TSA ticket checkers (3.84) and other TSA agents (3.80); thoroughness of inspection (3.94); TSA wait time (3.72); airport staff courtesy (3.99); ATMs/money exchanges (3.85); Internet access/WiFi (3.60); business lounges (3.62); availability of restrooms (3.71); restroom cleanliness (3.89); terminal audience (2.91); arrival Passport inspection (3.80) and arrival speed of bags (3.54).

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. T: Very small sample base size.

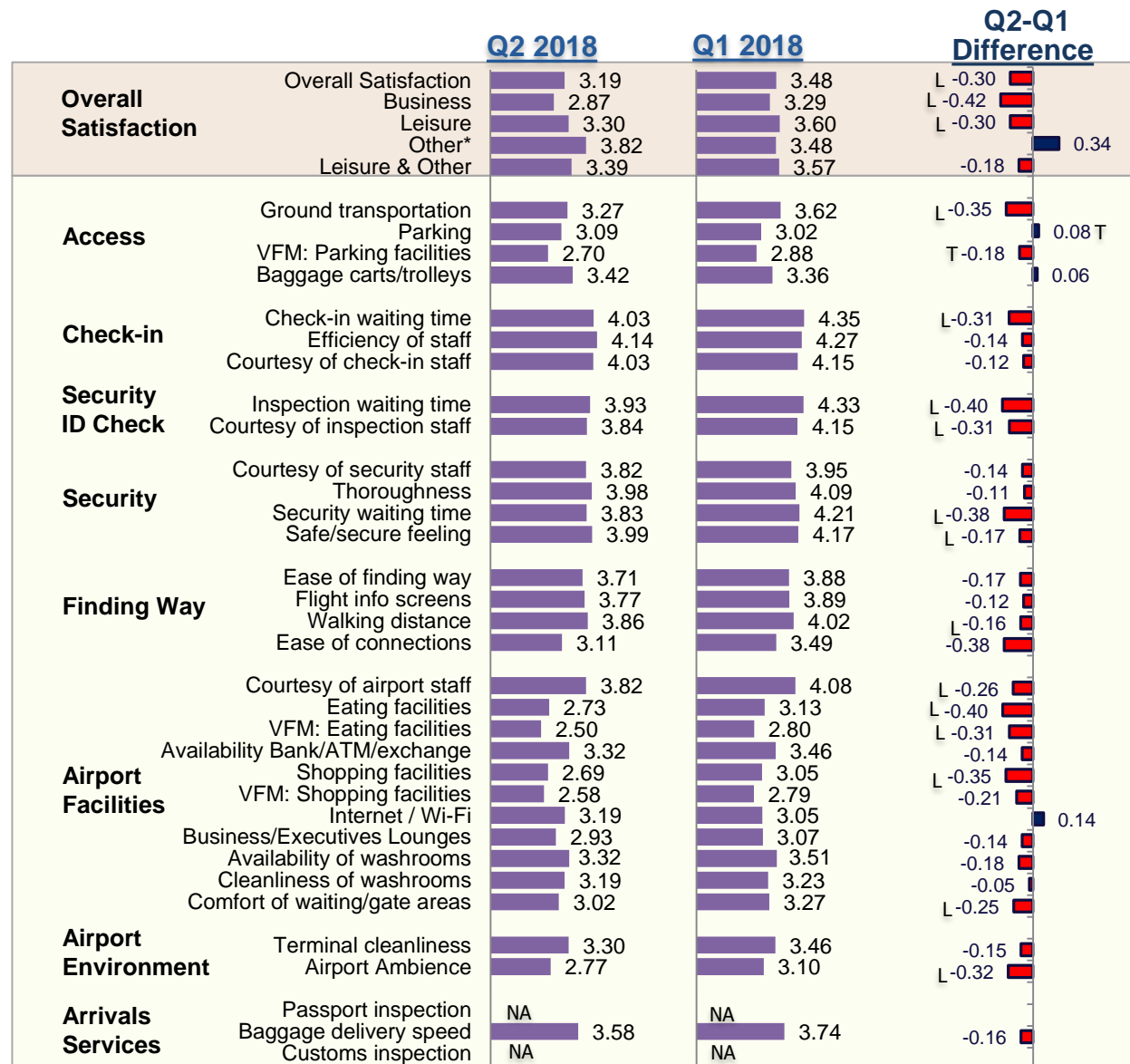
LGA Terminal A Performance



Satisfaction remained stable overall in Q2, as did all terminal elements. Parking facilities VFM scored highest (4.75); shopping facilities scored lowest (2.65).

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. T: Very small sample base size.

LGA Terminal B Performance



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 ambience (2.77). Check-in staff efficiency (4.14) was the highest scoring satisfaction element.

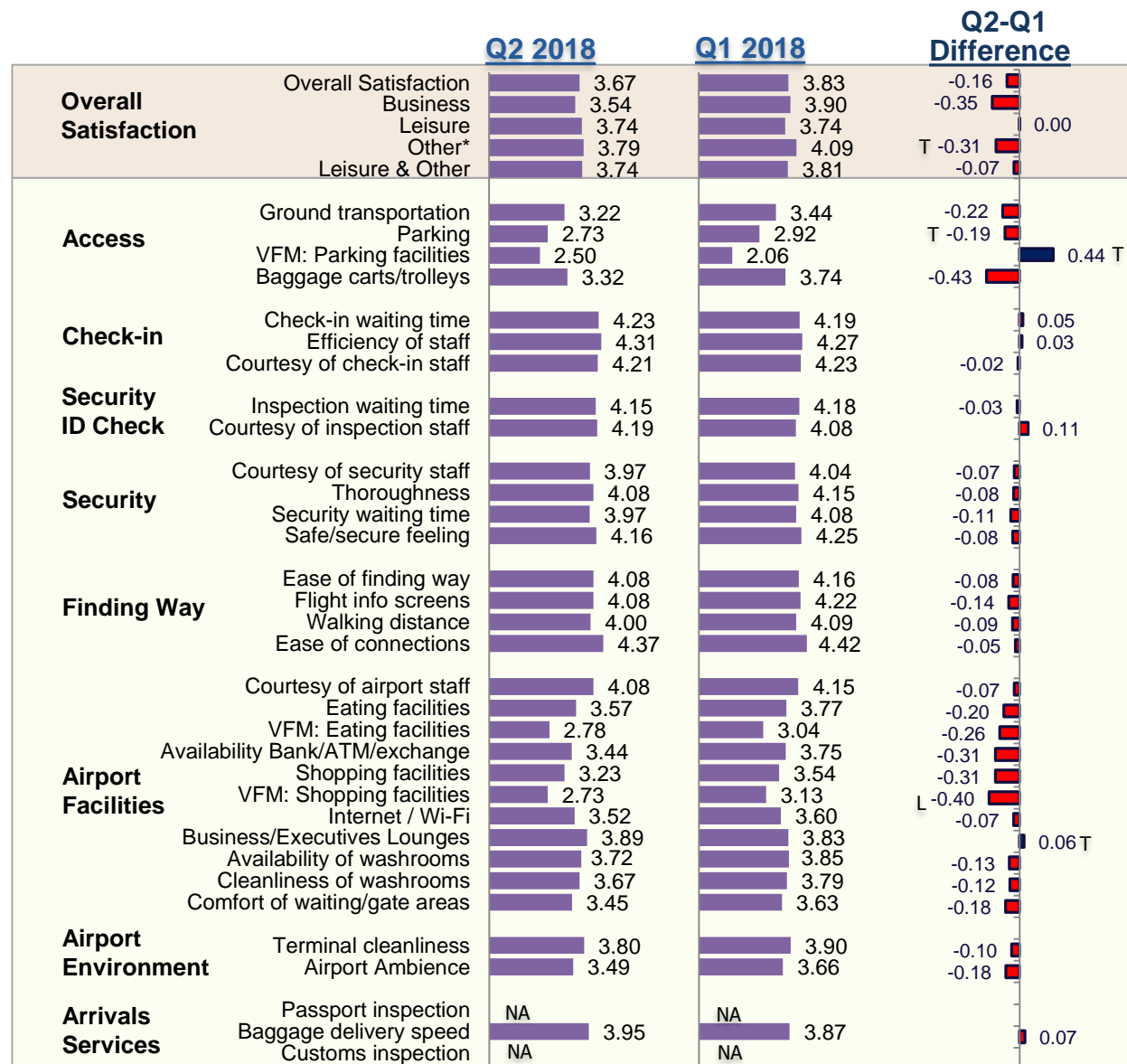
Domestic travelers rate TB significantly higher than int'l travelers on: parking facilities (3.14) and their VFM (2.74); shopping facilities (2.80) and their VFM (2.65); gate comfort (3.07) & terminal cleanliness (3.34).

Women rate TB significantly higher than men on: wayfinding (3.91); FIDS (3.95); eating places VFM (2.68); & terminal ambience (2.91)

Leisure travelers rate TB significantly higher than business travelers on: satisfaction overall (3.39); ground transportation (3.46); baggage carts (3.80); walking distance in terminal (3.97); shopping facilities (2.87); restroom availability (3.50) and cleanliness (3.41); gate comfort (3.21) and terminal cleanliness (3.48); & ambience (3.00).

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. T: Very small sample base size.

LGA Terminal C Performance



THE PORT AUTHORITY OF NY & NJ

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).

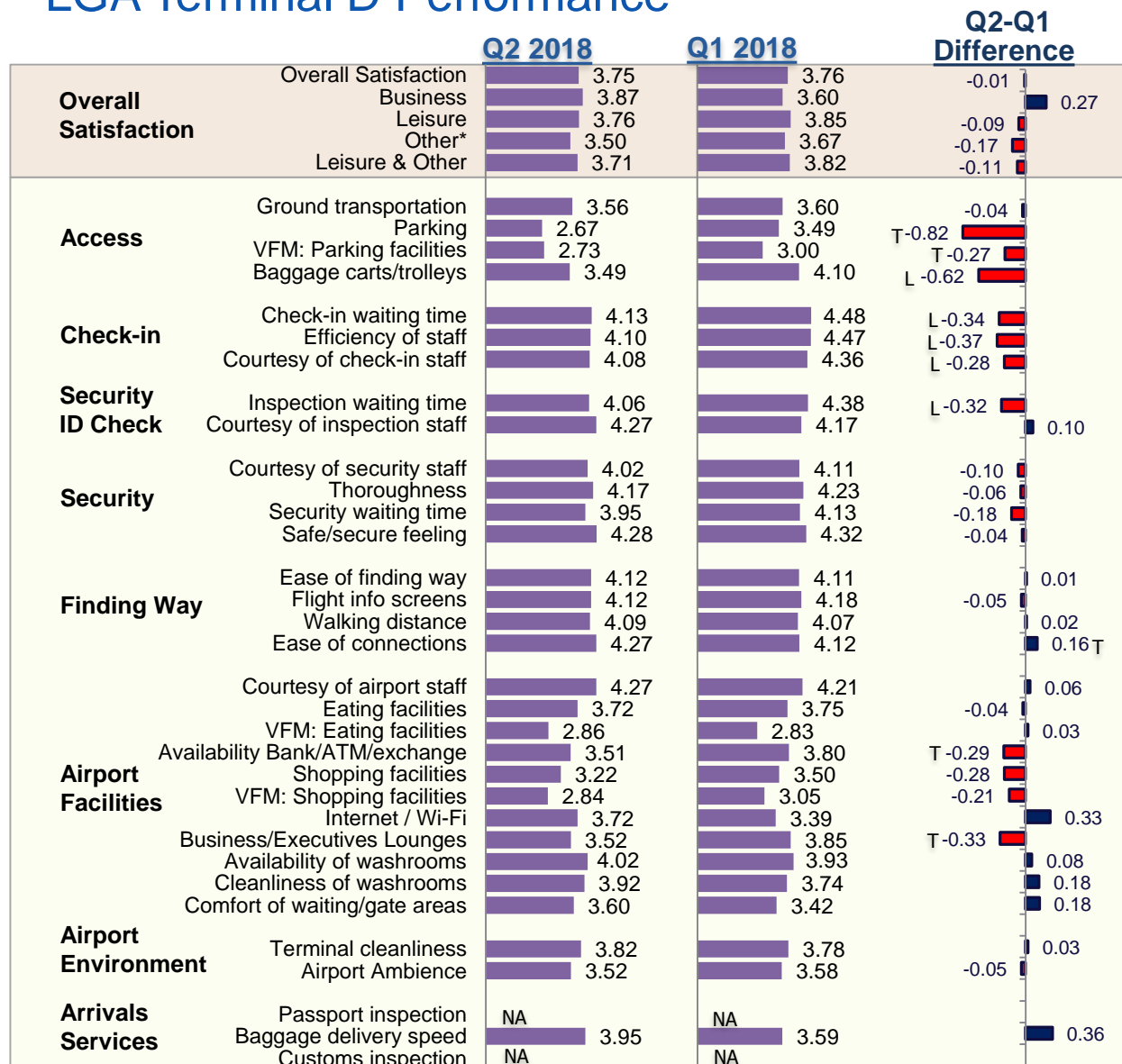
Connectors rate TC significantly higher than local O-D passengers on: overall satisfaction (3.97); restroom availability (4.08) and cleanliness (4.03); and terminal cleanliness (4.16).

Leisure travelers rate TC significantly higher than business travelers on: thoroughness of Sec. Check inspection (4.20) and wait time (4.10).

Women rate TC significantly higher than men on: ground transportation to/from airport (3.65) and parking facilities VFM (3.60).

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. T: Very small sample base size.

LGA Terminal D Performance



Satisfaction remained stable overall despite a significant decline in satisfaction in Q2 on all three check-in terminal elements, baggage carts (3.49) and TSA ID inspection wait time (4.06). Safe/secure feeling scored highest in satisfaction (4.28); parking facilities (2.67) scored lowest.

Leisure travelers rate TD significantly higher than business travelers on parking facilities (3.01) and their VFM (3.00), but significantly lower on TSA ID check wait time (3.96) and TSA inspection wait time (3.84).

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. T: Very small sample base size.

Thank You!



www.aci.aero

© 2017 ACI