



J.D. POWER

2018 Airport Satisfaction StudySM

New York John F. Kennedy - JFK

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Practice Lead

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Summary of Findings

JFK significantly improves in every factor area, resulting in a significant 25 point improvement year over year and improving one ranking to 14th

JFK is one of the most improved airports in the study.

Key Takeaways

- JFK ranks 2nd for Food, Beverage, & Retail Satisfaction, a large improvement from ranking 13th in 2017. JFK showed the greatest improvement of all Mega airports with a significant 41 point improvement year over year
- JFK scores are highest when passengers use the Main Counter to check-in. At other Mega airports scores are highest when passengers use the Curbside.
- Compared to the Mega airport average, JFK's biggest weakness is in the Terminal Facilities factor. Cleanliness of terminal restrooms and terminal concourses and hallways are big weaknesses compared to other Mega airports. Ability to clearly hear announcements, enough seats and enough electrical outlets are gate areas where JFK does well

Recommended Actions

- JFK has seen improvements across all factors but can further improve in the key factors of Terminal Facilities and Access.
 - JFK lags the Mega Access index score by 18 points
 - Terminal Facilities has an 8 point gap
- As with many multi-terminal Mega airports, experience varies greatly among terminals
- Despite impressive gains in Food, Beverage and Retail; only 44% of JFK passengers report purchasing any food or beverage. Creating demand by continuing to increase variety and selection.
- “Local” flavor in F, B & R can be improved at JFK. This will drive satisfaction and non-aeronautical revenues.

Survey Methodology

Index Model remains unchanged from 2017

Fielding periods:

W1 – October 2017

W2 – January 2018

W3 – April 2018

W4 – July 2018

Airport Quotas:

Mega – 700 responses

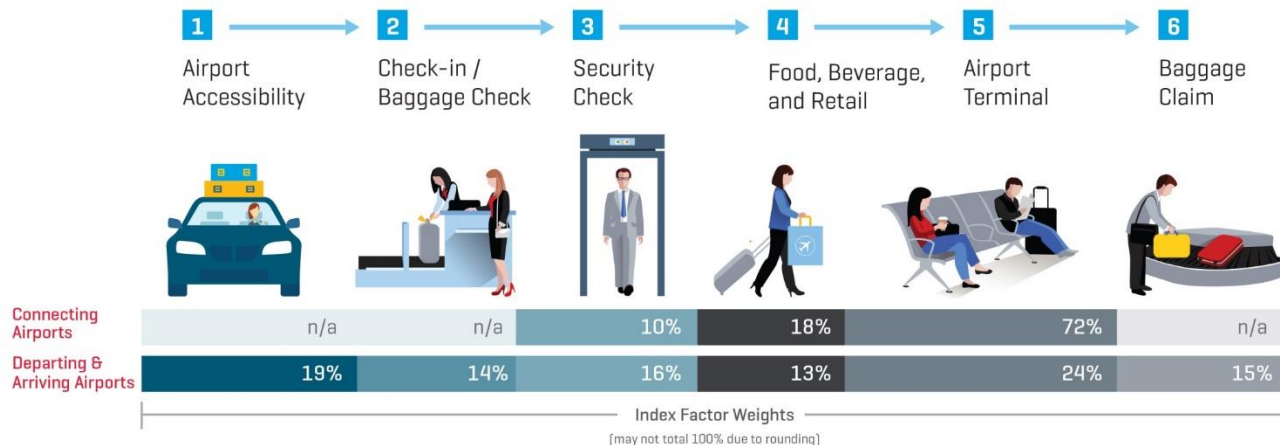
JFK – 1231 responses

Large – 500 responses

Medium – 300 responses

2018 Survey Methodology

- 64 North America Airports ranked based on 31,489 respondents resulting in 40,183 airport evaluations (online).
 - 8,694 Connectors
- Travelers evaluated either departing or arriving airport; qualified respondents may rate connecting airports as well.



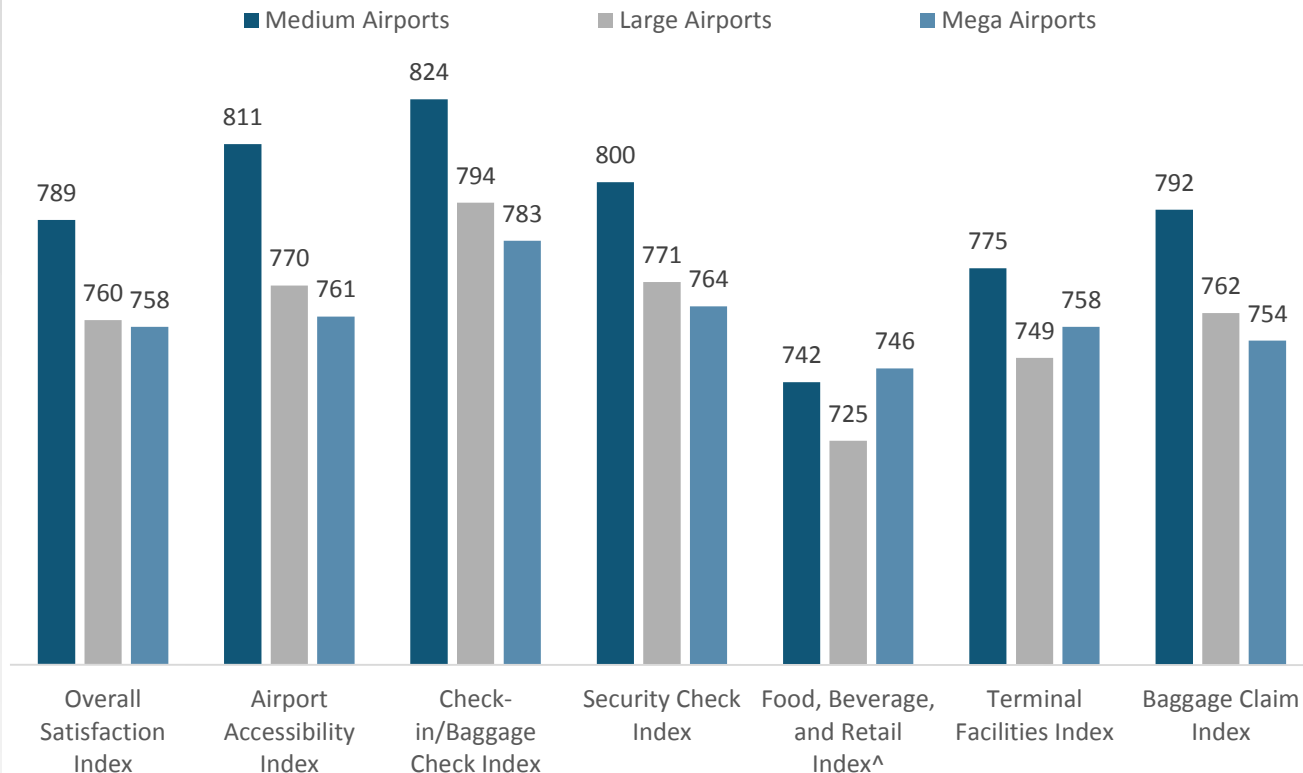


Overall Performance

Segment Factor Performance

Medium airports have an advantage in accessibility compared to Large and Mega airports

Segment Factor Performance



Note: [^]Based to those who purchased food/beverage and/or merchandise/services while at the airport

%Based to those who had checked baggage to claim at the airport.

2018 Overall Satisfaction

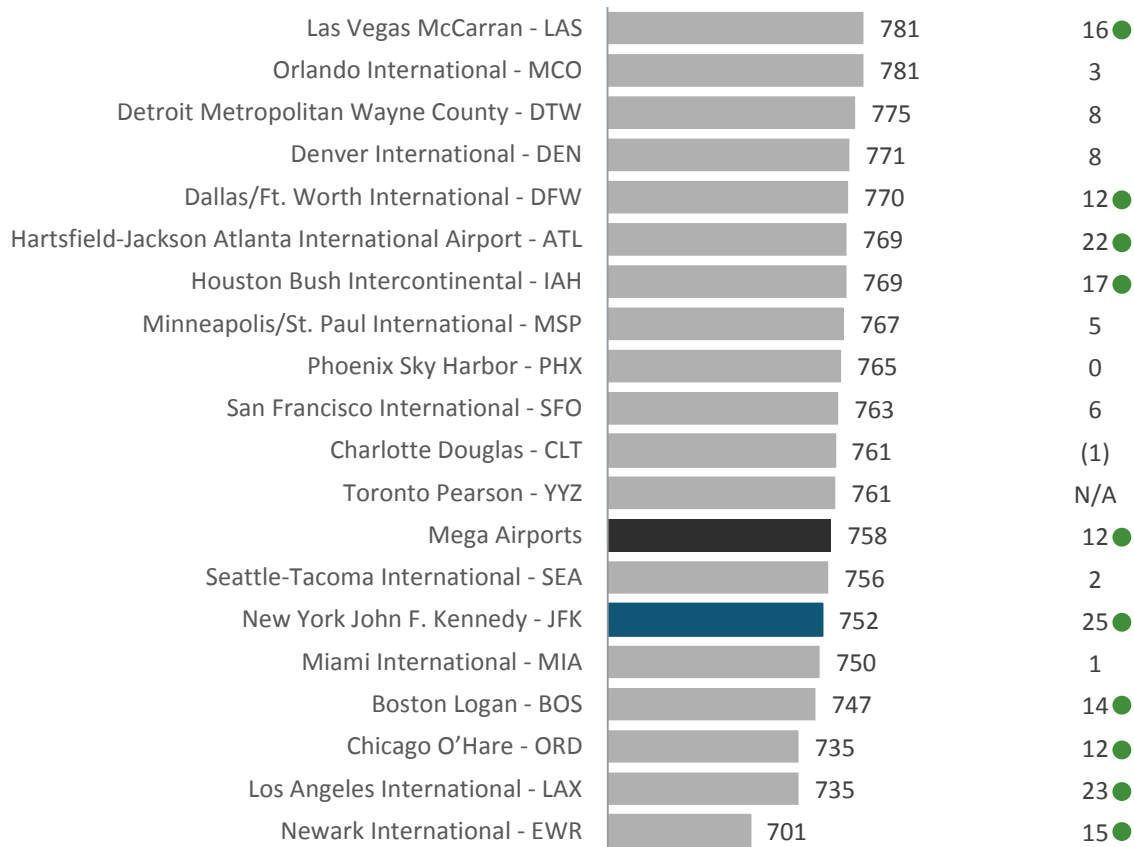
JFK ranks 14th for Overall Satisfaction, an improvement from ranking 15th in 2017

JFK makes a significant 25 point improvement year over year, higher than the 12 point significant improvement of the Mega Airport segment

Note: N/A – No relevant 2017 data available due to survey enhancements;
●● Denotes a significant difference at a 90% confidence interval; Change is better/(worse).

Overall Satisfaction Index: Mega Airports

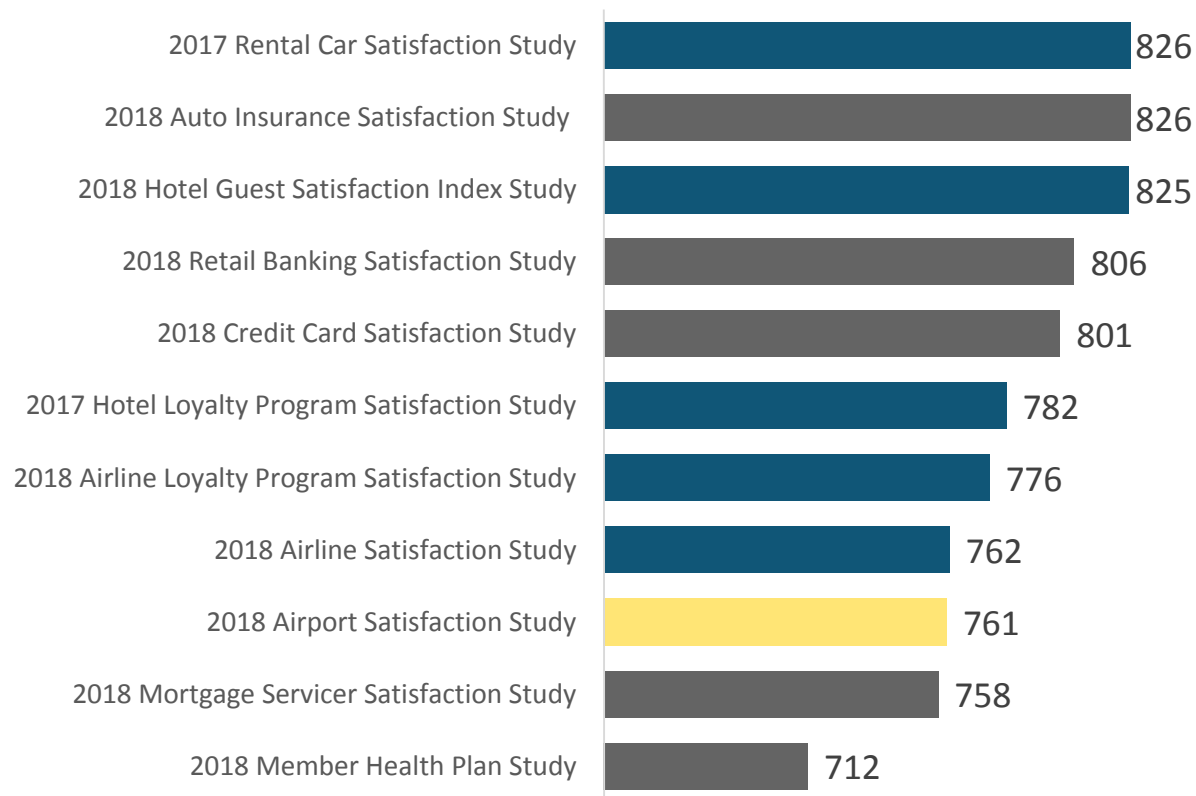
Change vs
2017



How Do Airports Stack Up?

Airport satisfaction is on par with Airline satisfaction

Cross Industry Rankings (Service Industries)



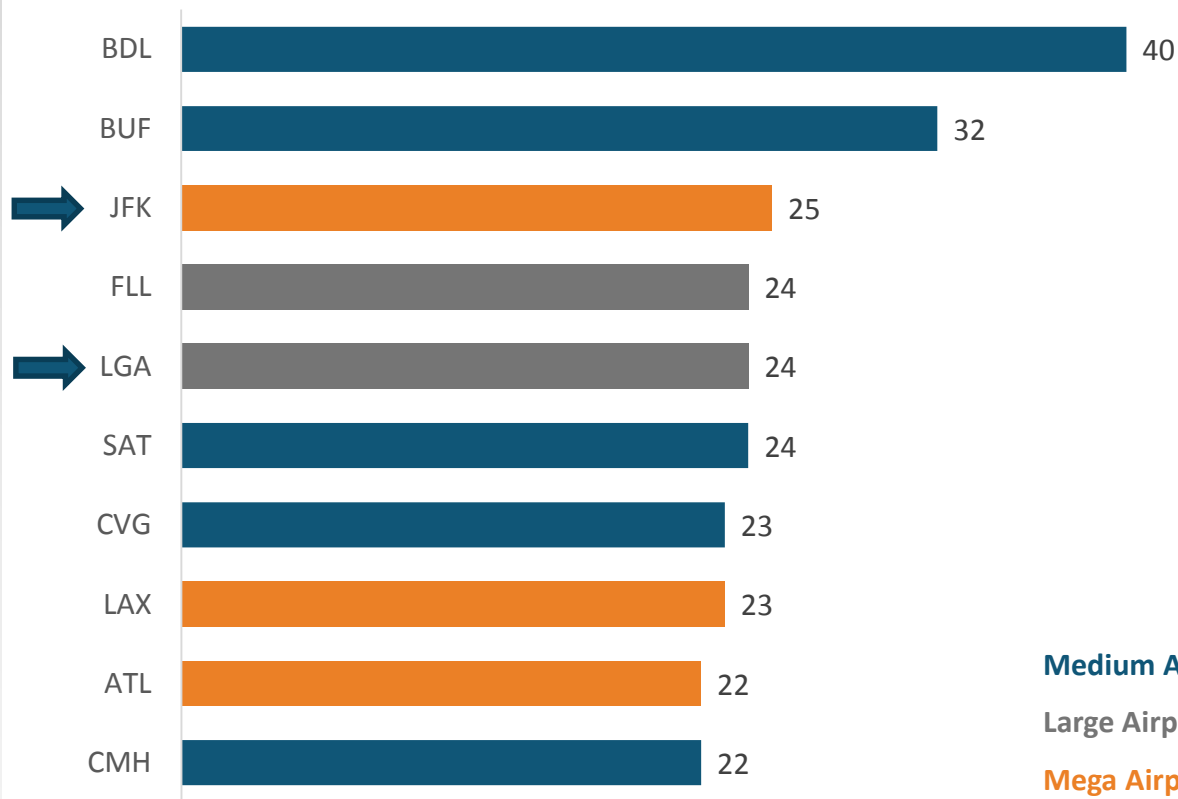
Most Improved Airports

While the airport industry improved 12 points overall, the most improved airports improved over 20 points each

JFK is the third most improved airport in the 2018 study.

Note: Top 10 most improved airports shown

2018 Most Improved Airports



Medium Airports

Large Airports

Mega Airports

Factor Performance

JFK significantly improves
in every factor area

JFK scores higher than the Mega airport
segment in Food, Beverage, and Retail
factor

Factor Performance

		New York John F. Kennedy - JFK	New York John F. Kennedy - JFK 2017	Mega Airports
Airport Accessibility Index	+45	743	698	761
Check-in/Baggage Check Index	+38	768	730	783
Security Check Index	+38	751	713	764
Food, Beverage, and Retail Index^	+41	759	718	746
Terminal Facilities Index	+17	750	733	758
Baggage Claim Index	+34	741	707	754

Note: ^Based to those who purchased food/beverage and/or merchandise/services while at the airport

%Based to those who had checked baggage to claim at the airport

SWOOP Brand v. Segment

Compared to the Mega airport average, JFK's greatest opportunity for improvement is in the Terminal Facilities factor

Weighted Gaps – JFK vs. Mega Airports



SWOOP Brand vs. Brand

Compared to ATL, JFK's greatest opportunity for improvement is terminal facilities followed by Baggage Claim

Weighted Gaps – JFK vs. ATL



SWOOP Brand vs. Brand

Compared to DFW, JFK's greatest opportunity for improvement is Terminal Facilities followed by Security Check

Weighted Gaps – JFK vs. DFW



SWOOP Brand vs. Brand

Compared to DEN, JFK's greatest opportunity for improvement is Terminal Facilities followed by Airport Accessibility

Weighted Gaps – JFK vs. DEN



SWOOP Brand vs. Brand

Compared to MIA, JFK's greatest opportunity for improvement is Security Check followed by Airport Accessibility

Weighted Gaps – JFK vs. MIA

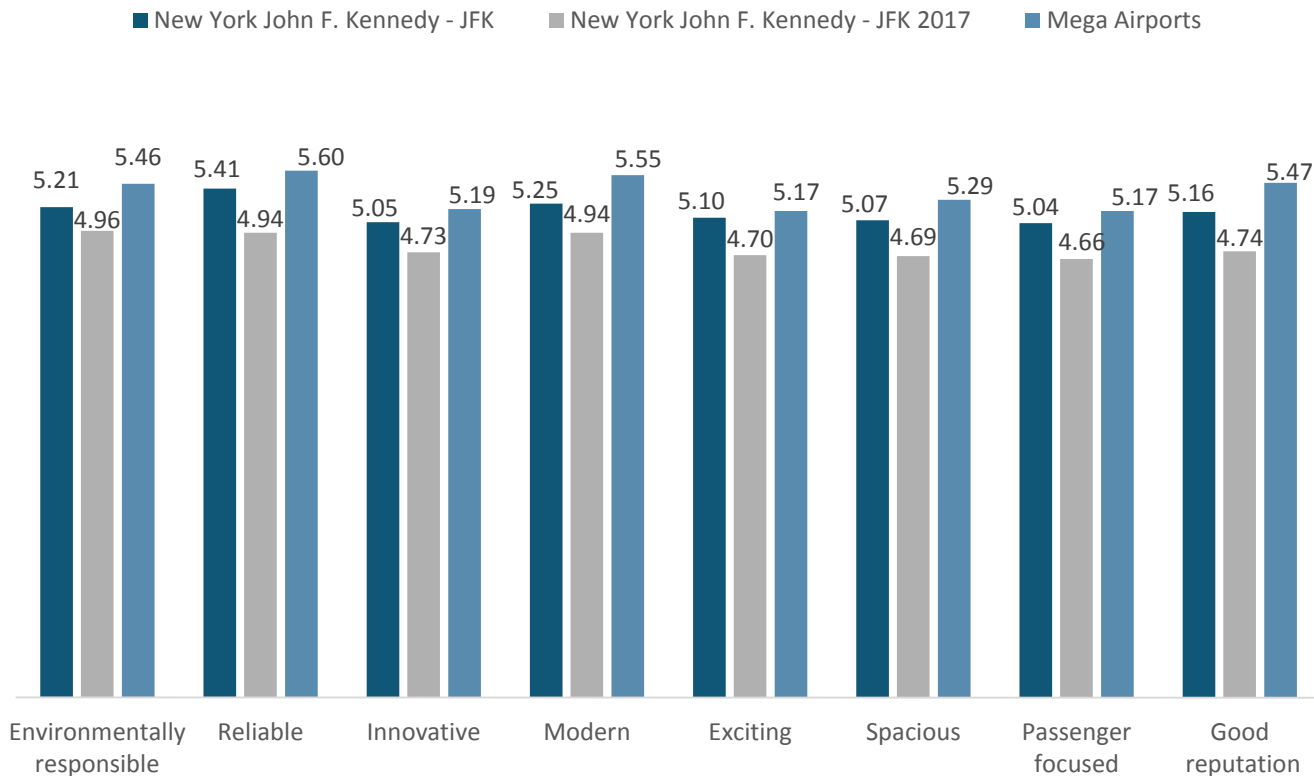


Brand Image

JFK improved brand image in every area compared to 2017

“Reliable” is the brand image area to improve the most

Brand Image Performance

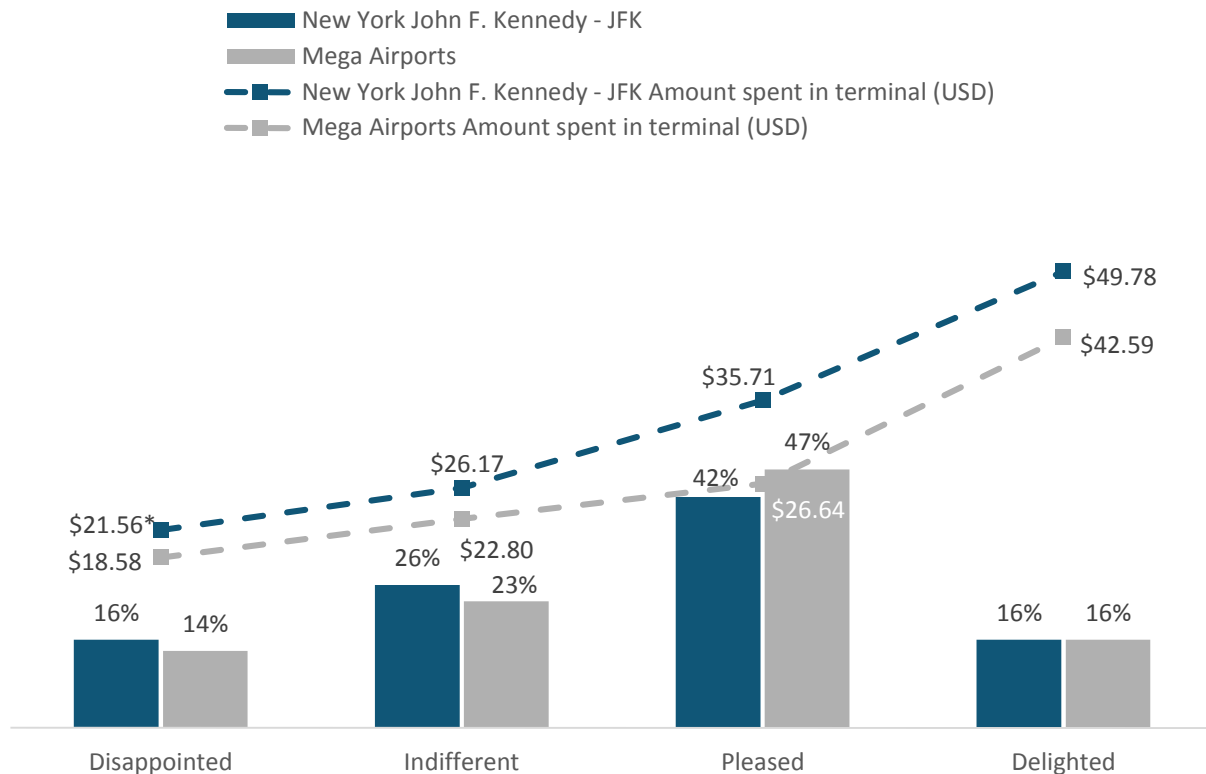


The ROI of Satisfaction

Delighted passengers spend more

Delighted passengers at Mega airports spend almost \$16 more than pleased passengers

Overall Satisfaction and In Terminal Spending

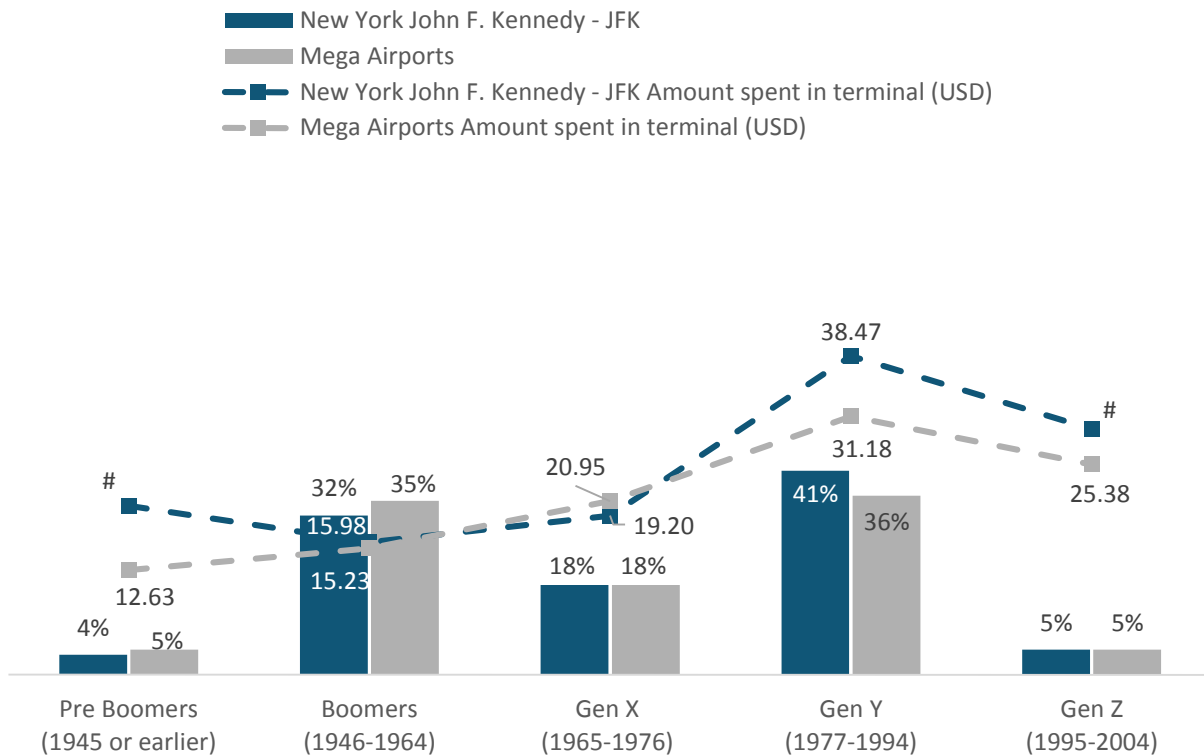


Note:*small sample size (n=30-99).

Generational Spend

Gen Y passengers spend more money at JFK than any other generation group, also seen at other Mega airports

Overall Satisfaction and In Terminal Spending



Note: *Small sample size (n<30-99), # Insufficient Sample Size (n<30).



Airport Accessibility

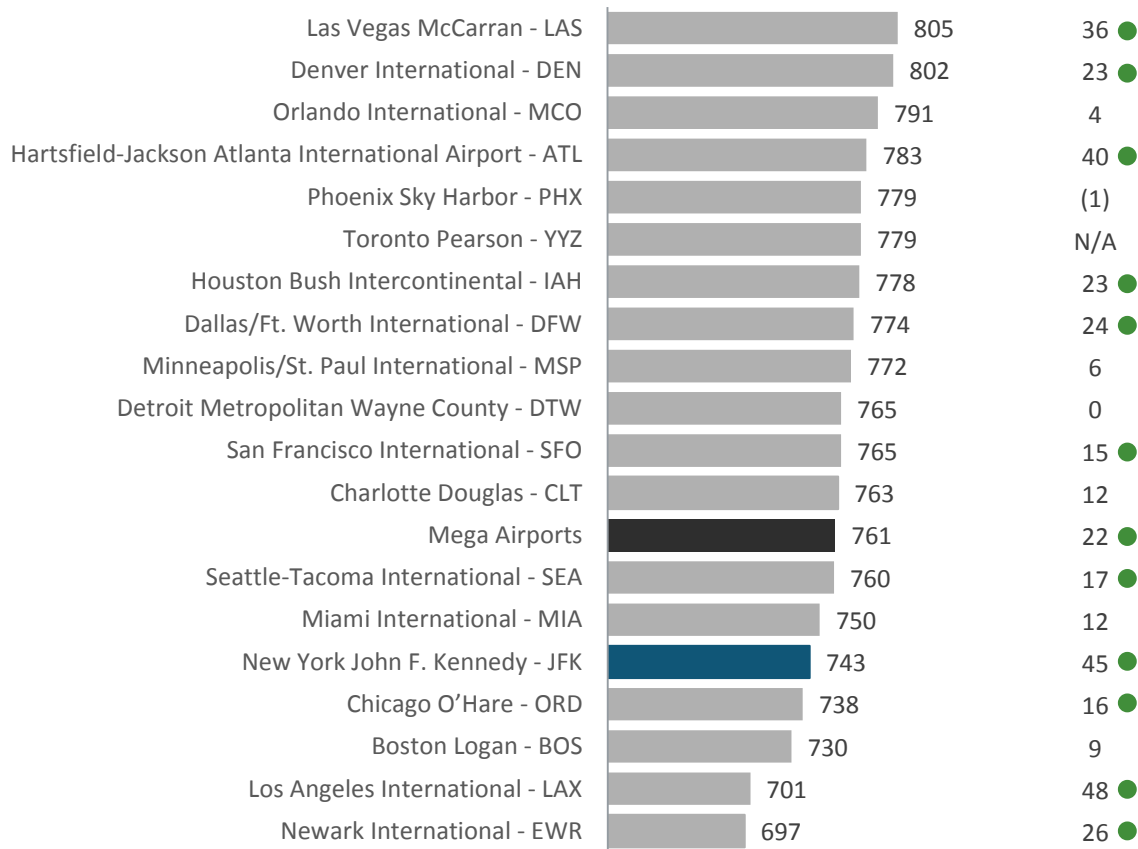
Airport Accessibility Satisfaction

JFK ranks 15th for Airport Accessibility, an improvement from 16th in 2017

JFK makes a significant 45 point improvement year over year, more than double the 22 point significant improvement of the Mega Airport segment

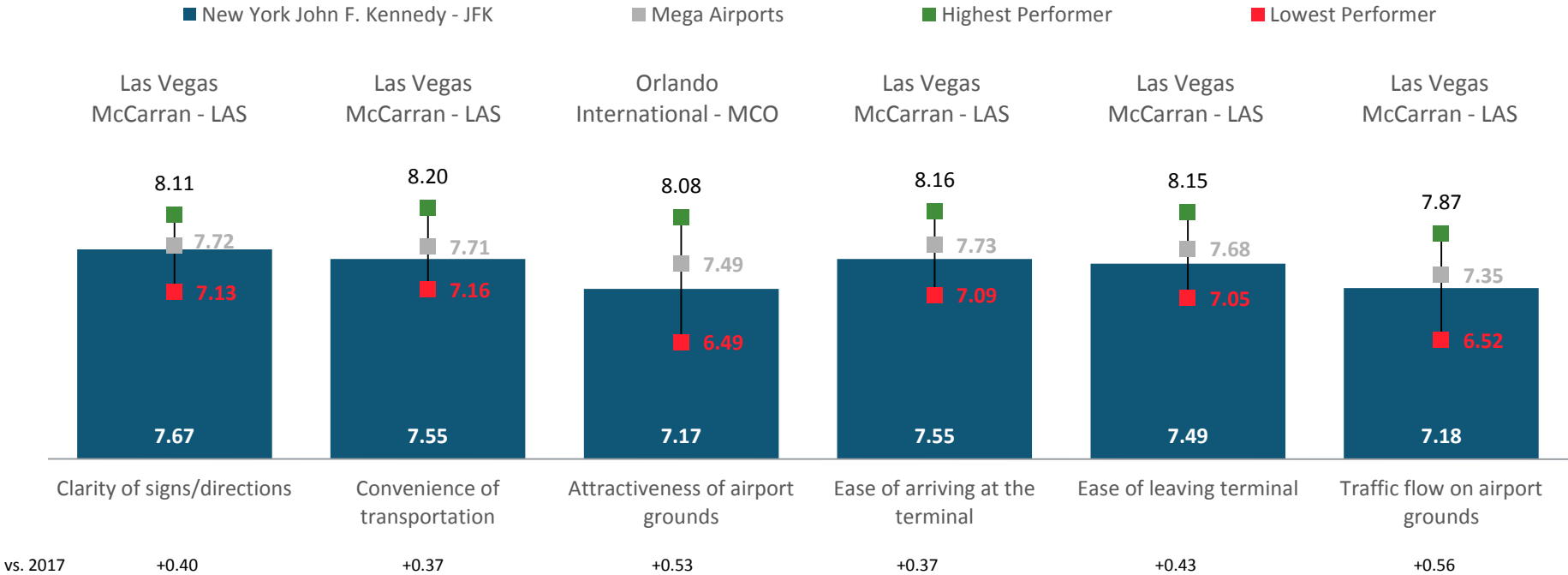
Airport Accessibility Satisfaction Index: Mega Airports

Change vs
2017



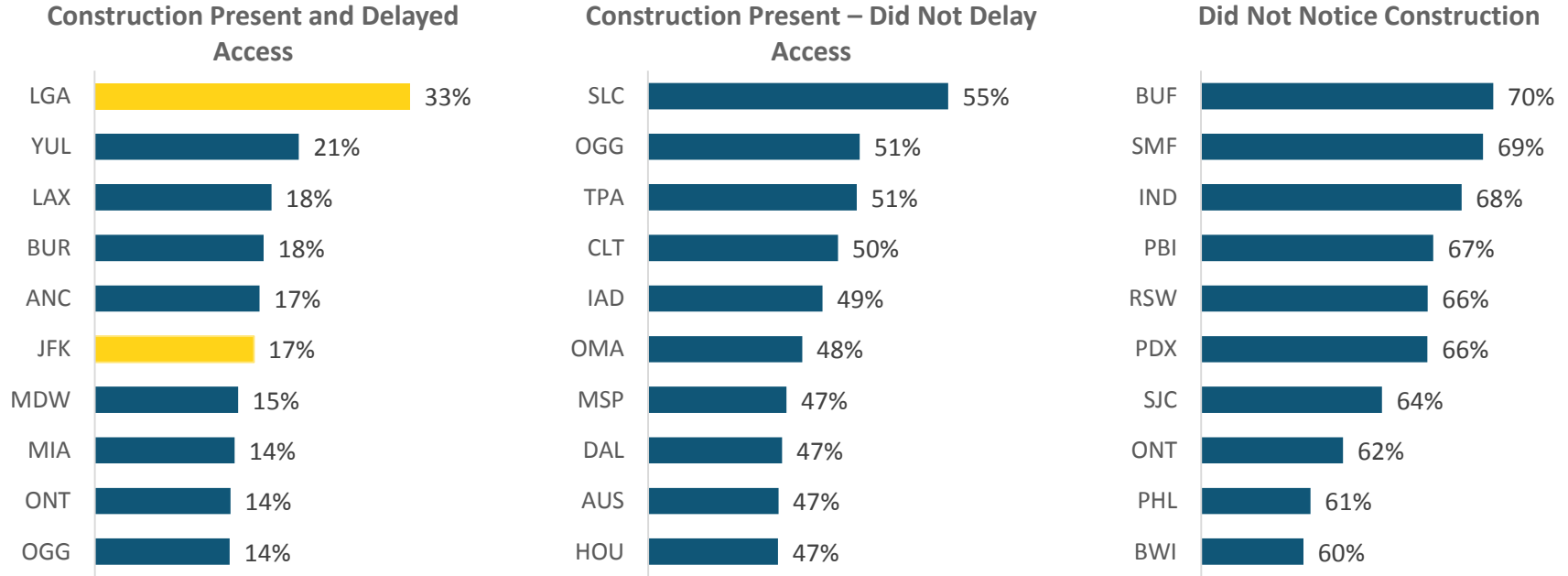
Note: N/A – No relevant 2017 data available due to survey enhancements;
● Denotes a significant difference at a 90% confidence interval; Change is better/(worse).

Attribute Performance



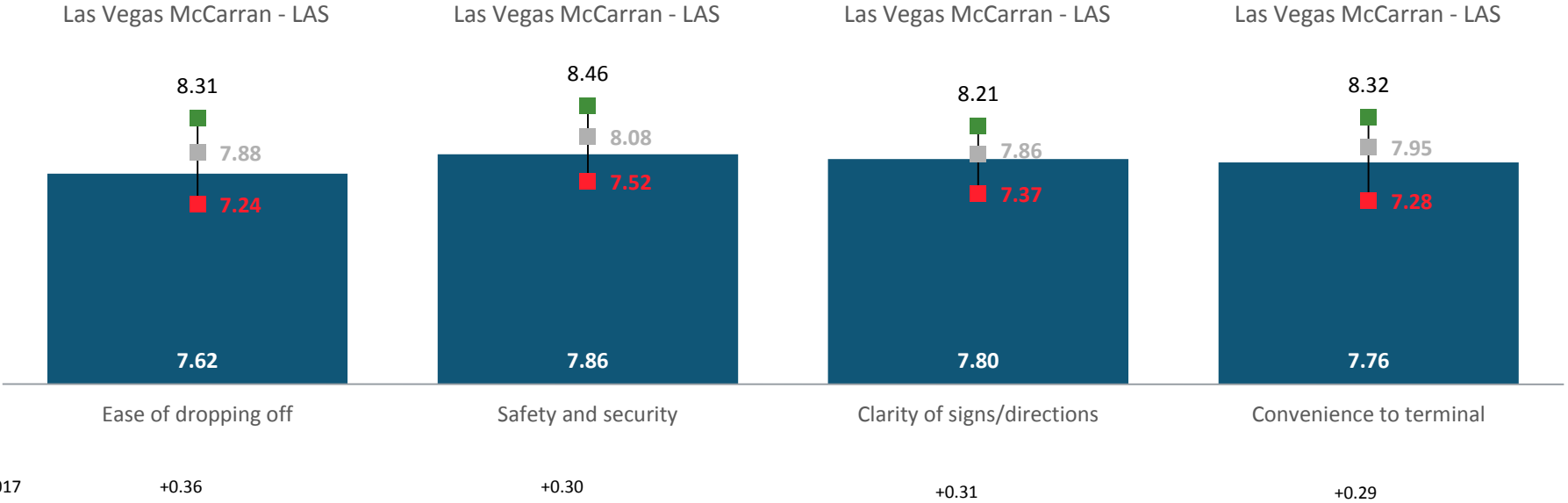
Airport Accessibility Satisfaction

The airport accessibility index is 60 points lower when construction delays access to the airport.
Construction delayed access – 706, Construction did not delay access – 766, No construction - 789



Attribute Performance – Drop Off Experience

■ New York John F. Kennedy - JFK ■ Mega Airports ■ Highest Performer ■ Lowest Performer

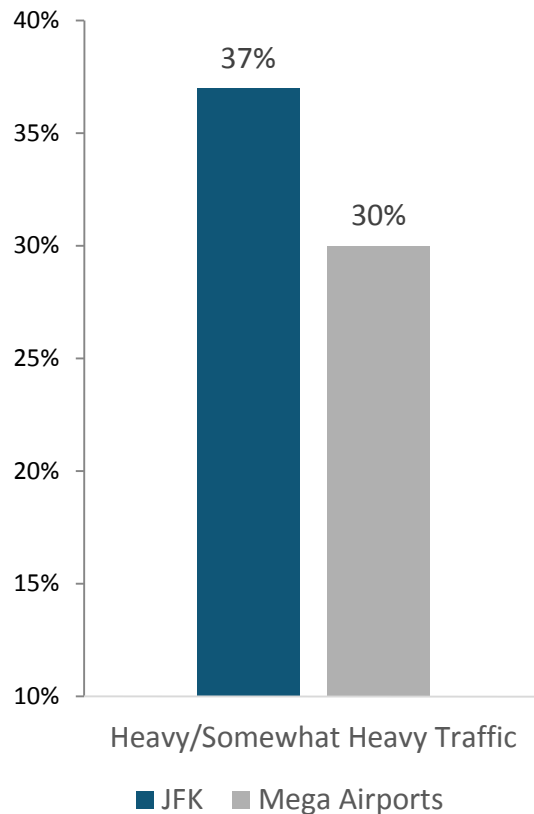


Airport Accessibility

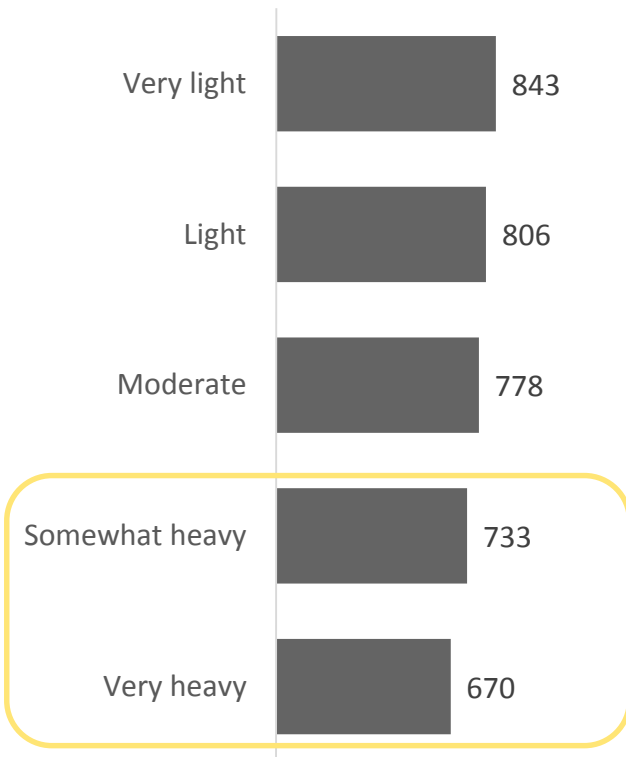
Traffic congestion impacts Airport Accessibility satisfaction

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

Traffic Congestion Getting to the Airport



Airport Accessibility Index by Traffic Congestion – Total Industry



Airport Accessibility

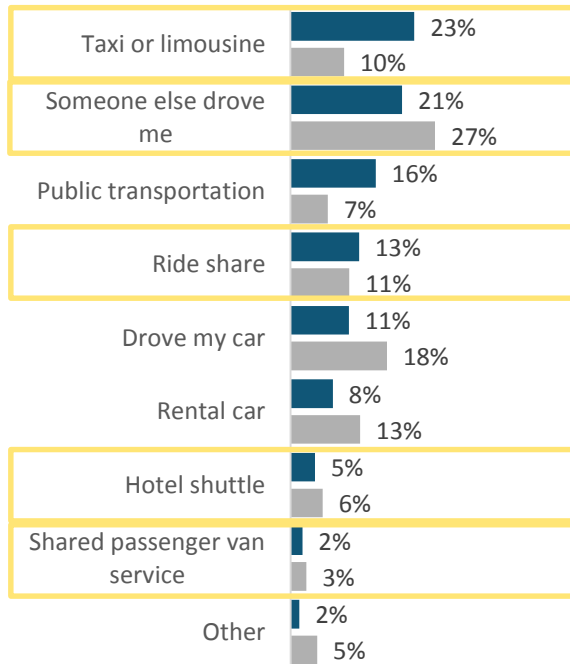
Airport Accessibility satisfaction is 176 higher when passengers are able to easily find curb space at Mega airports

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

Note: *small sample size (n=30-99).

How Did You Travel to the Airport?

■ New York John F. Kennedy - JFK ■ Mega Airports



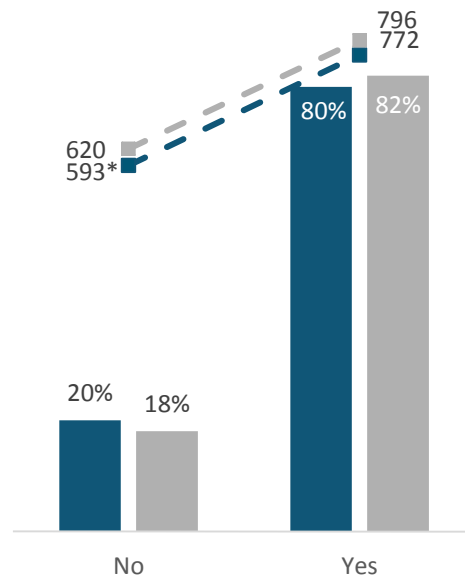
Was it Easy to Find Curb Space Upon Arrival?

■ New York John F. Kennedy - JFK

■ Mega Airports

■ New York John F. Kennedy - JFK Airport Accessibility Index

■ Mega Airports Airport Accessibility Index



2018 Airport Satisfaction Study

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Check-In/Baggage Check

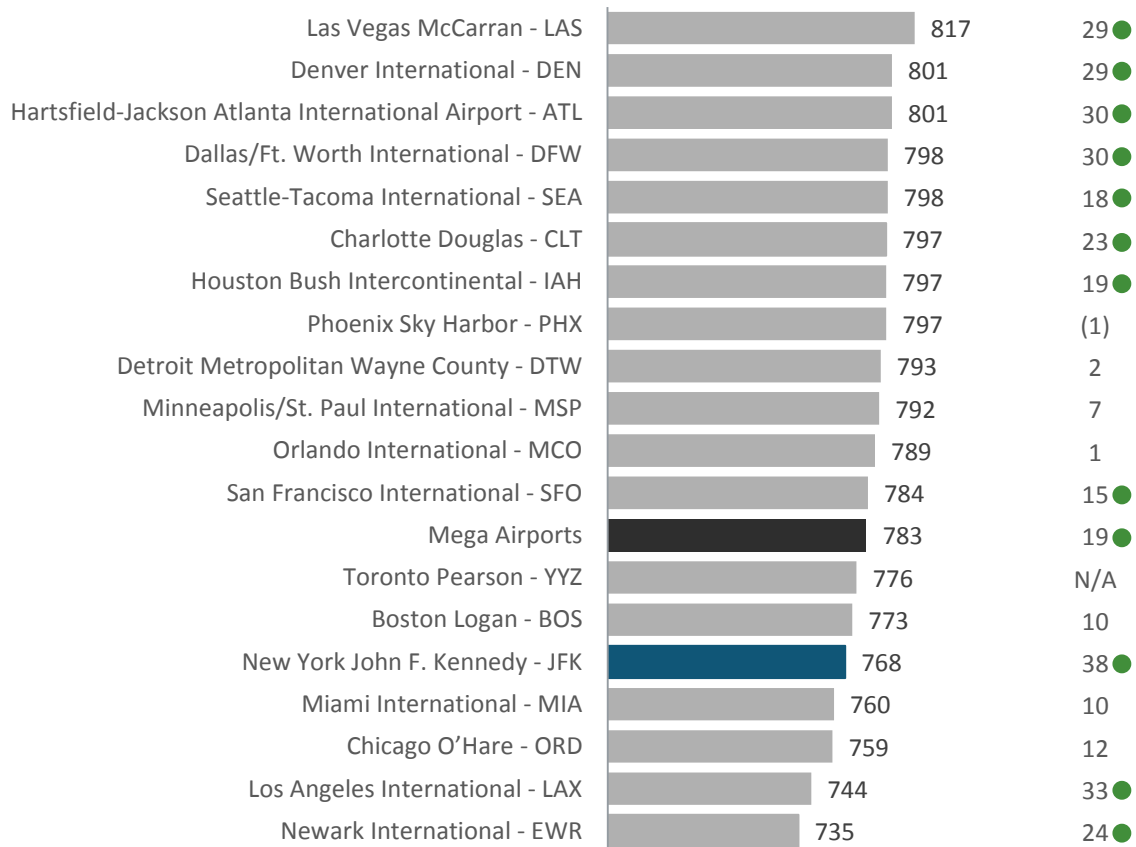
Check-In/Baggage Check Satisfaction

JFK ranks 15th for Check-In/Baggage Check Satisfaction, and was ranked 16th in 2017

JFK makes a significant 38 point improvement year over year, double the 19 point significant improvement of the Mega Airport segment

Check-In/Baggage Check Satisfaction Index: Mega Airports

Change vs
2017



Note: N/A – No relevant 2017 data available due to survey enhancements;
● Denotes a significant difference at a 90% confidence interval; Change is better/(worse).

Check-In/Baggage Check

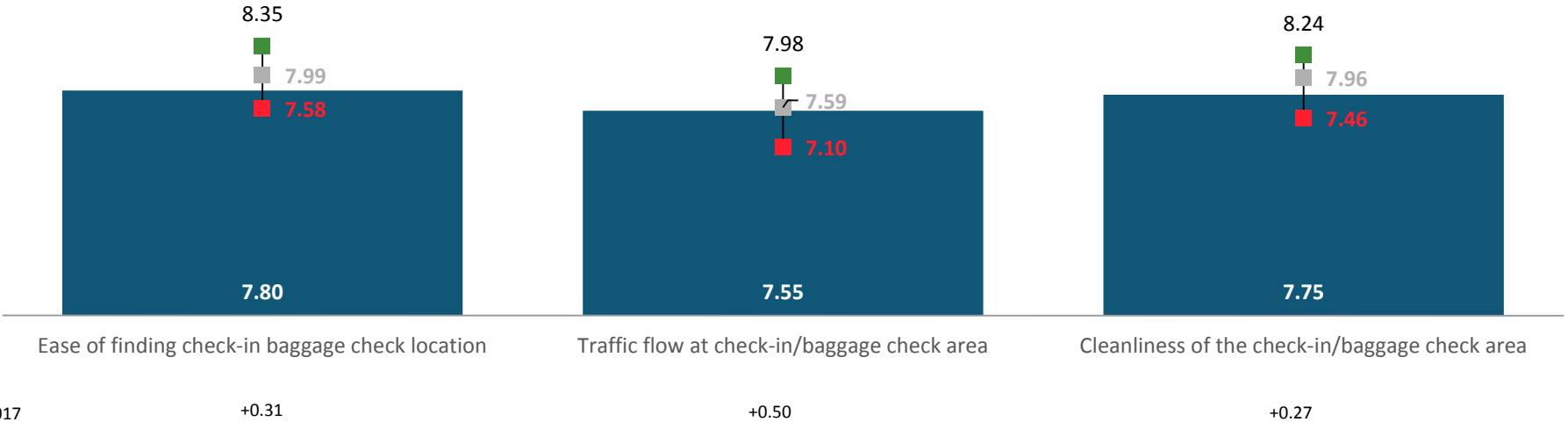
Attribute Performance

■ New York John F. Kennedy - JFK ■ Mega Airports ■ Highest Performer ■ Lowest Performer

Las Vegas McCarran - LAS

Las Vegas McCarran - LAS

Las Vegas McCarran - LAS



Check-In/Baggage Check Satisfaction

JFK scores are highest when passengers use the Main Counter.

At other Mega airports scores are highest when passengers use the Curbside check-in/baggage check.

JFK scores higher than other Mega airports for Traffic flow at check-in when passengers use the main counter or self check-in kiosk

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

New York John F. Kennedy - JFK	Main Counter	Self Check-in Kiosk	Curbside	Online
Ease of finding check-in/baggage check location	7.88	7.83	7.83*	7.59
Traffic flow at check-in	7.65	7.63	7.40*	7.32
Cleanliness of check-in area	7.92	7.80	7.65*	7.45

Mega Airports	Main Counter	Self Check-in Kiosk	Curbside	Online
Ease of finding check-in/baggage check location	7.97	7.98	8.34	7.90
Traffic flow at check-in	7.58	7.58	8.03	7.45
Cleanliness of check-in area	8.01	7.98	8.16	7.83

Note:*small sample size (n<30-99).



Security Check

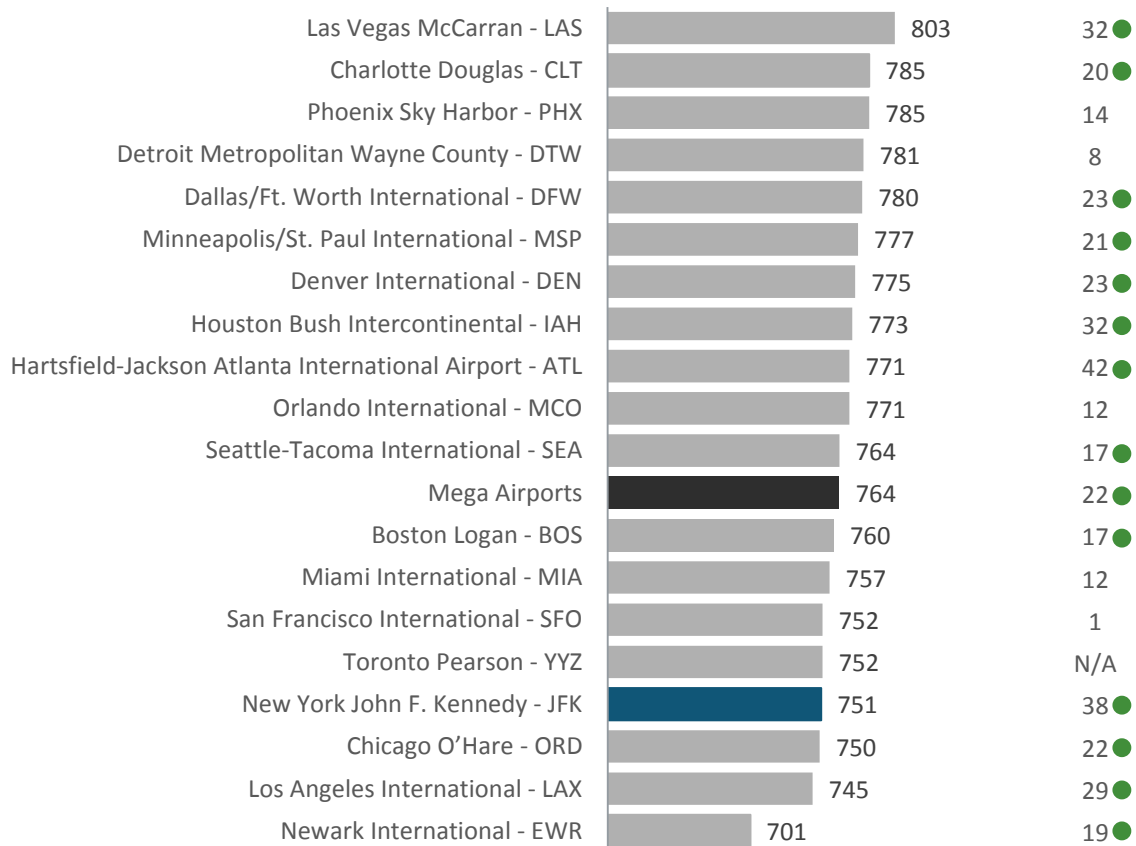
Security Check Satisfaction

JFK ranks 16th for Security Check Satisfaction, up from 17th in 2017

JFK makes a significant 38 point improvement year over year, higher than the 22 point significant improvement of the Mega Airport segment

Security Check Satisfaction Index: Mega Airports

Change vs
2017



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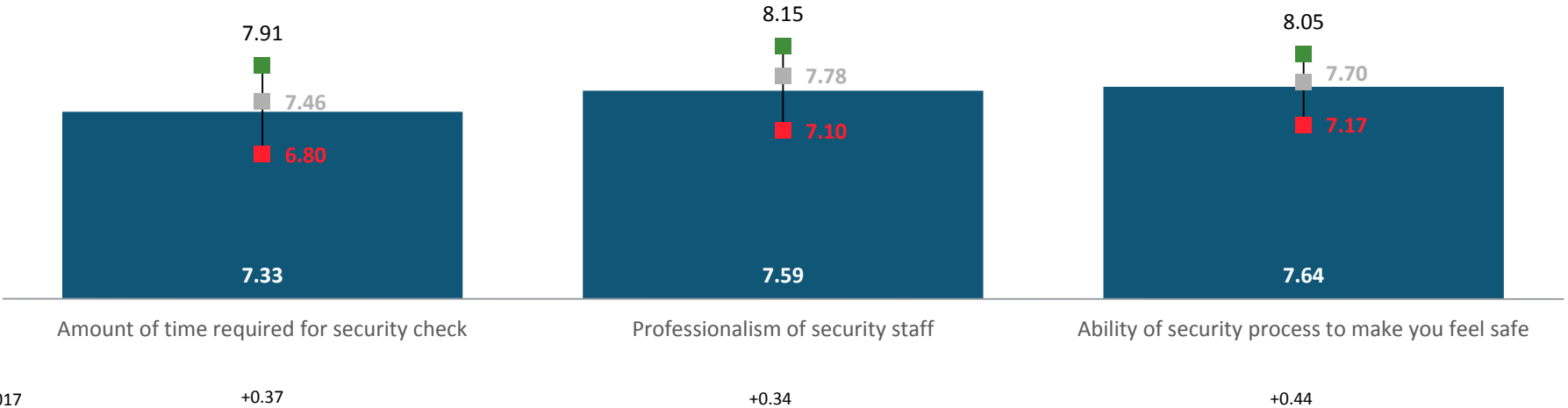
Attribute Performance

■ New York John F. Kennedy - JFK ■ Mega Airports ■ Highest Performer ■ Lowest Performer

Las Vegas McCarran - LAS

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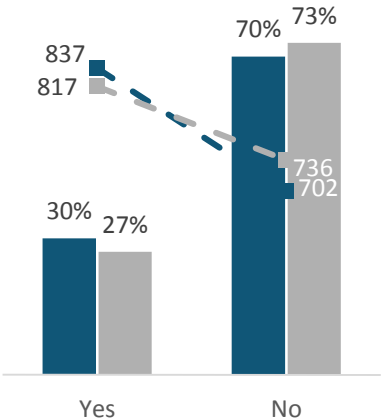
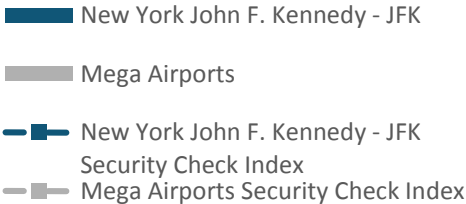


Security Check

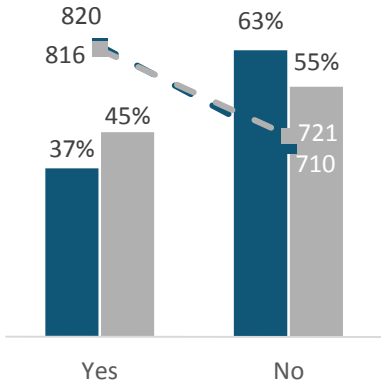
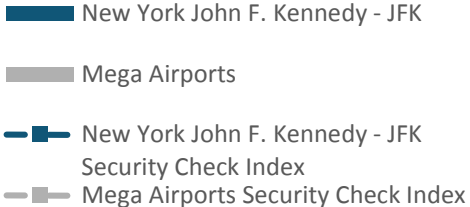
A speedy security check (10 minutes or less) and appropriate signage increase security check satisfaction

JFK is above the Mega airport average for appropriate signage but below the Mega airport average for speedy security check

Signage to Inform Security Wait Time by Security Check Satisfaction



Time to Get Through Security Less than 11 Minutes

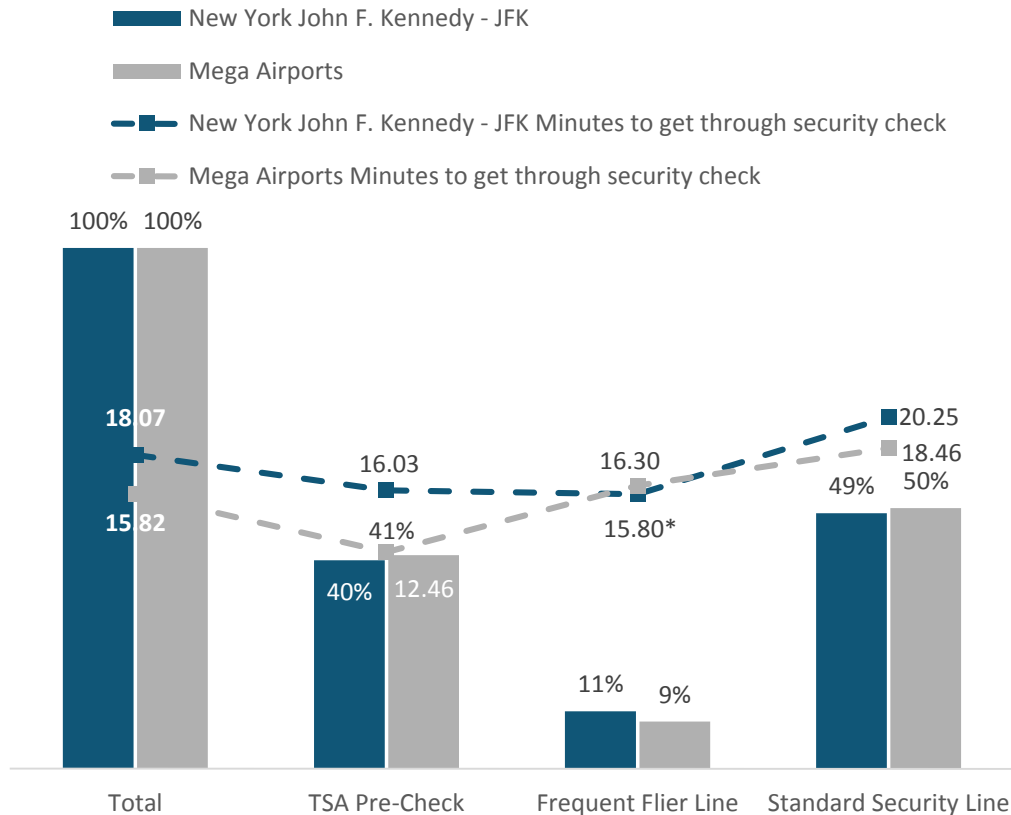


Security Check

Security wait times are over two minutes longer at JFK compared to Mega airports.

Security wait times in the Frequent Flier Line are nearly the same at JFK when compared to Mega airports

Security Line Type and Wait Time



Note:*small sample size (n=30-99).



Food, Beverage, & Retail Experience

Food, Beverage, & Retail Satisfaction

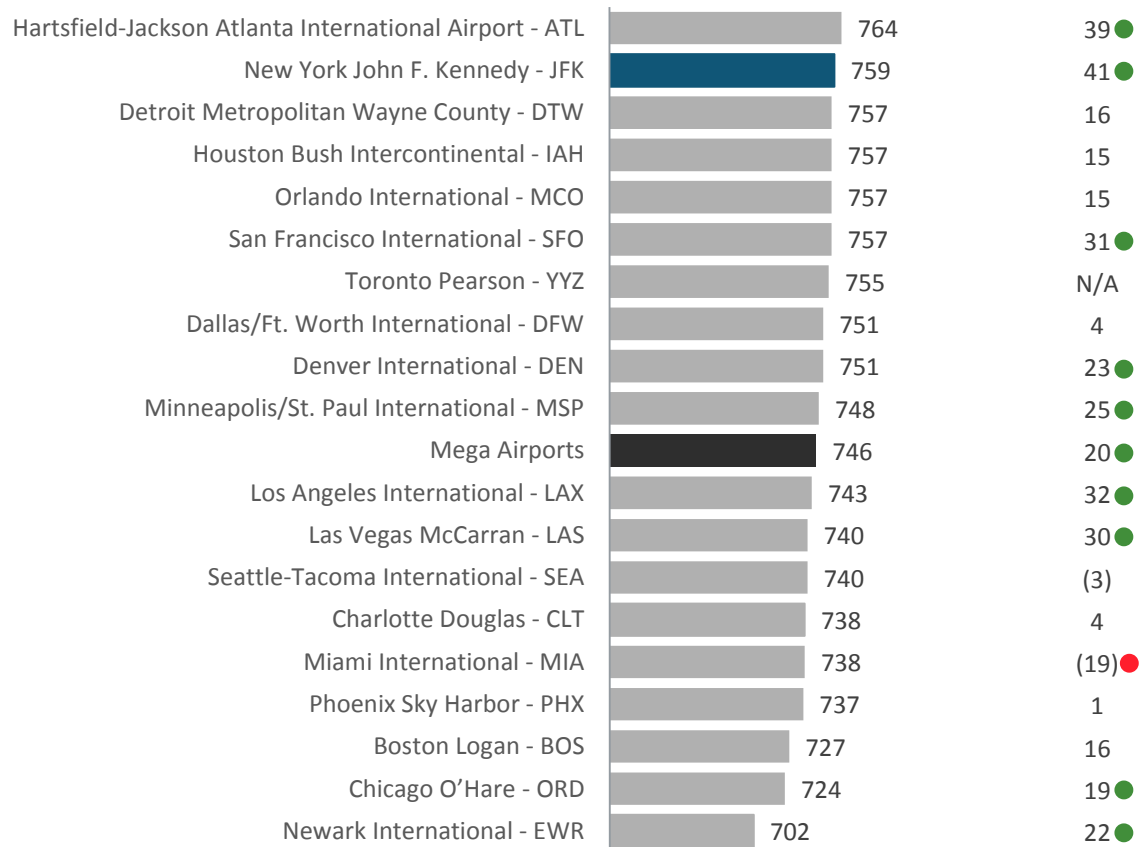
JFK ranks 2nd for Food, Beverage, & Retail Satisfaction, a substantial improvement from ranking 13th in 2017

JFK makes a significant 41 point improvement year over year, the greatest improvement of all airports in the Mega airport segment.

Note: N/A – No relevant 2017 data available due to survey enhancements;
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Food, Beverage, & Retail Satisfaction Index: Mega Airports

Change vs
2017



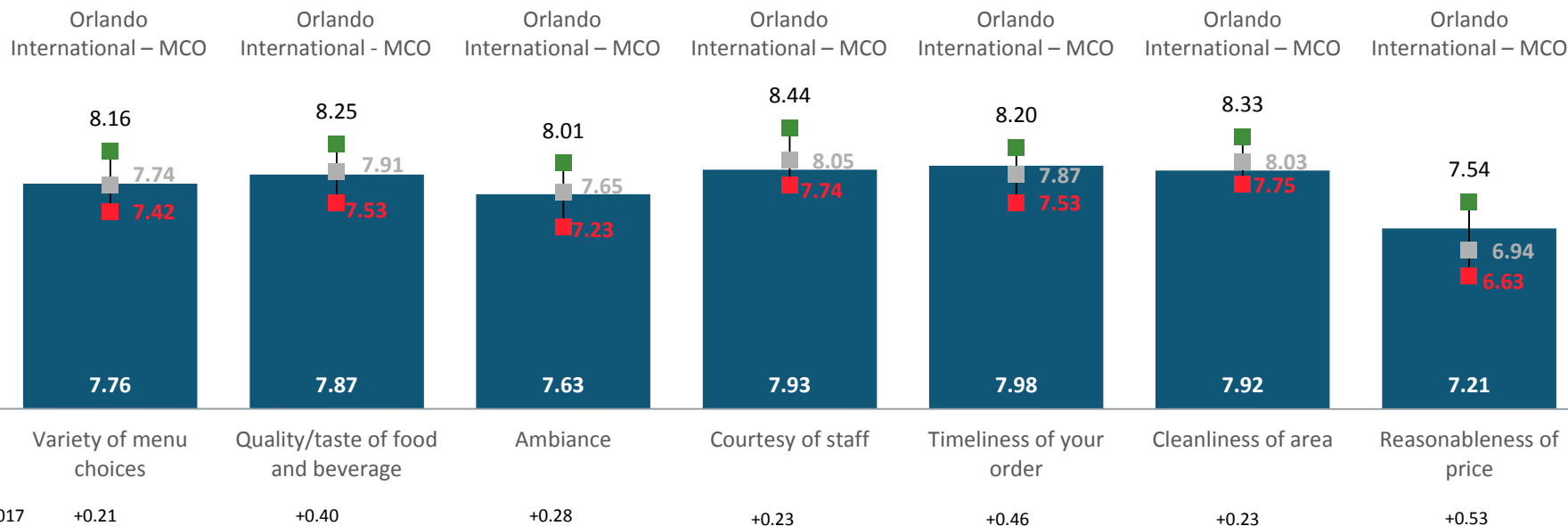
Attribute Performance – Restaurant/Bar

■ New York John F. Kennedy - JFK

■ Mega Airports

■ Highest Performer

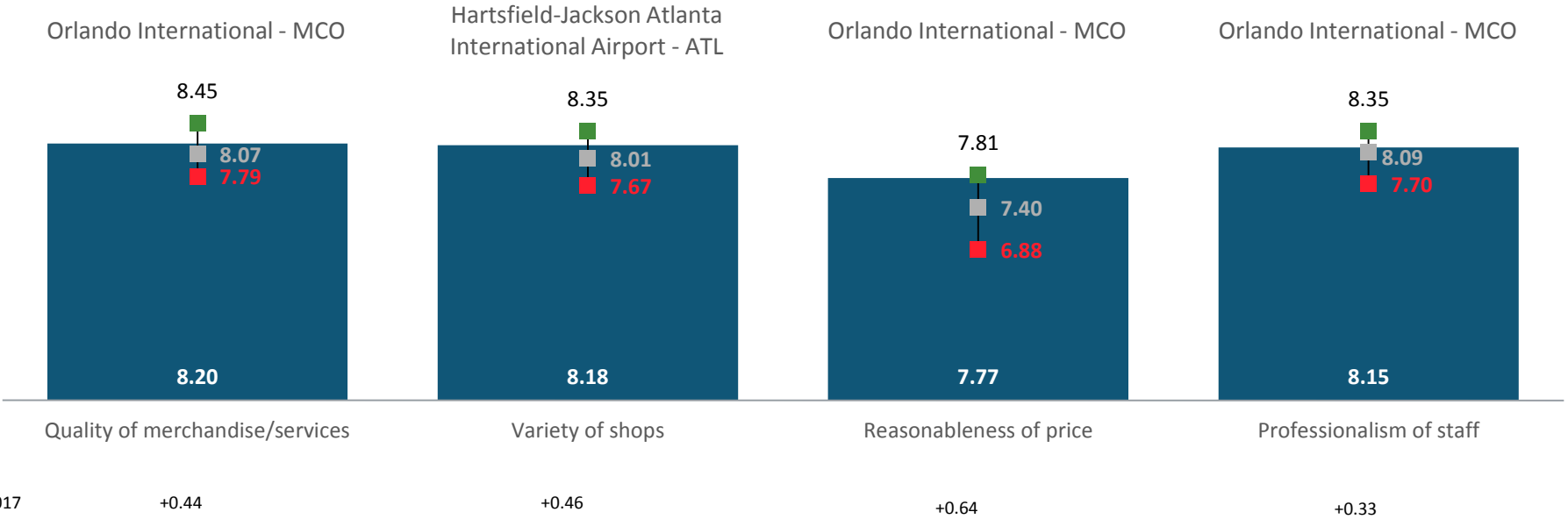
■ Lowest Performer



Note: Based to those who purchased food/beverage and/or merchandise/services while at the airport

Attribute Performance – Retail Service

■ New York John F. Kennedy - JFK ■ Mega Airports ■ Highest Performer ■ Lowest Performer



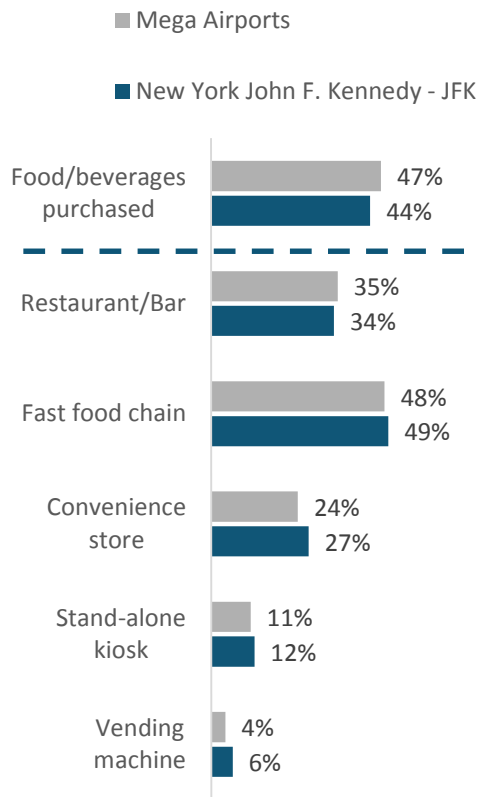
Note: Based to those who purchased food/beverage and/or merchandise/services while at the airport

Food, Beverage and Retail

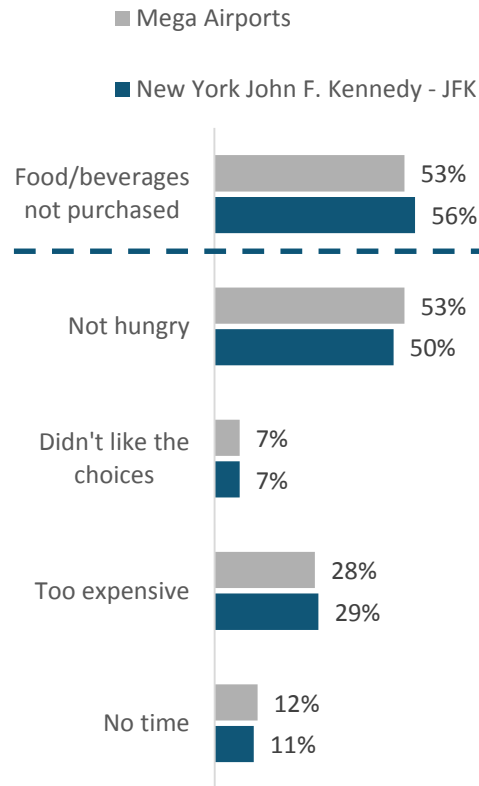
Fast food chain and Restaurant/Bar are the most common places passengers purchase F&B at JFK

Passengers at JFK list not being hungry as the most common reason for not purchasing F&B

Purchase Food and/or Beverages



Reason for Not Purchasing



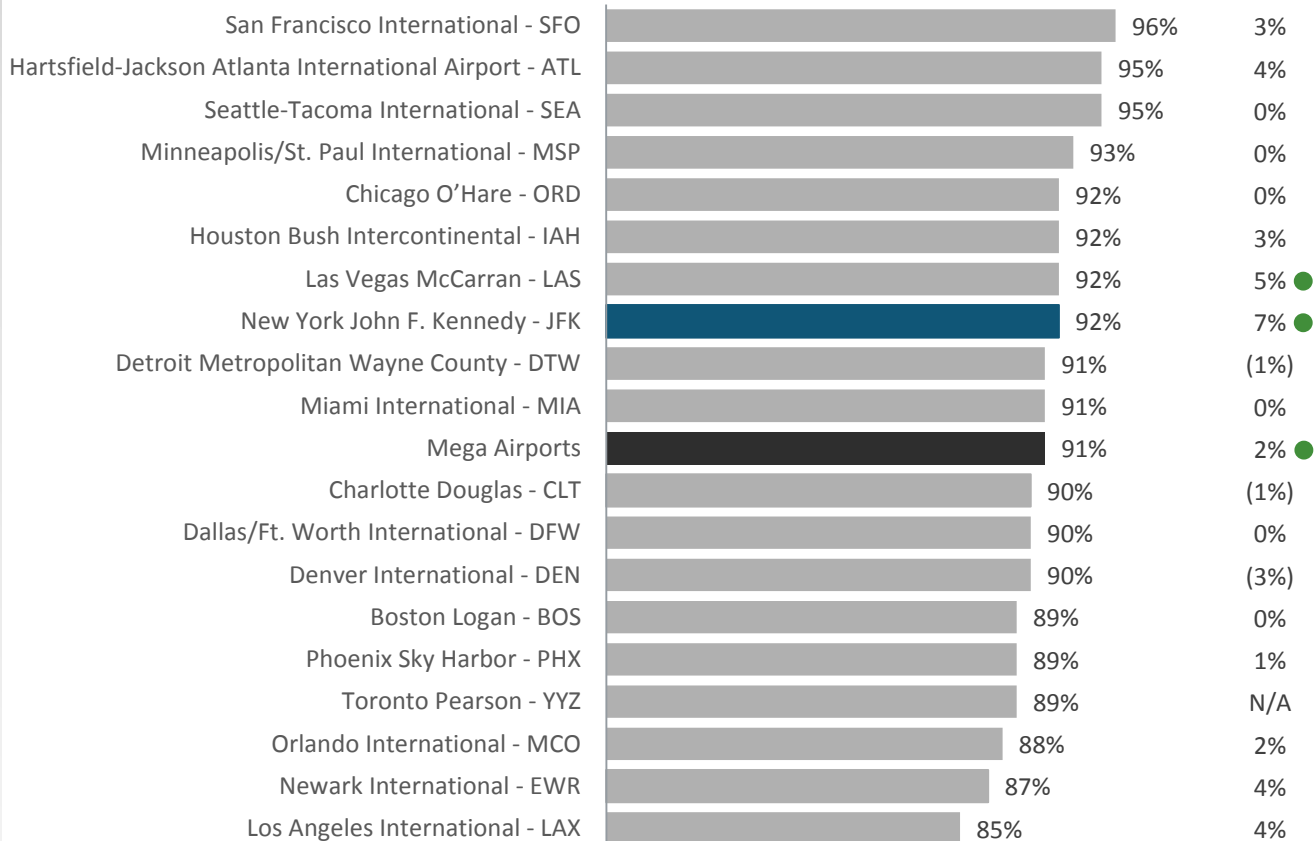
Food, Beverage, & Retail Satisfaction

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

The perception of locally flavored food in Mega airports has improved a significant 2 percentage points year over year.

Availability of Food & Beverage with Local Flavor: Mega Airports

Change vs
2017



Note: N/A – No relevant 2017 data available due to survey enhancements;
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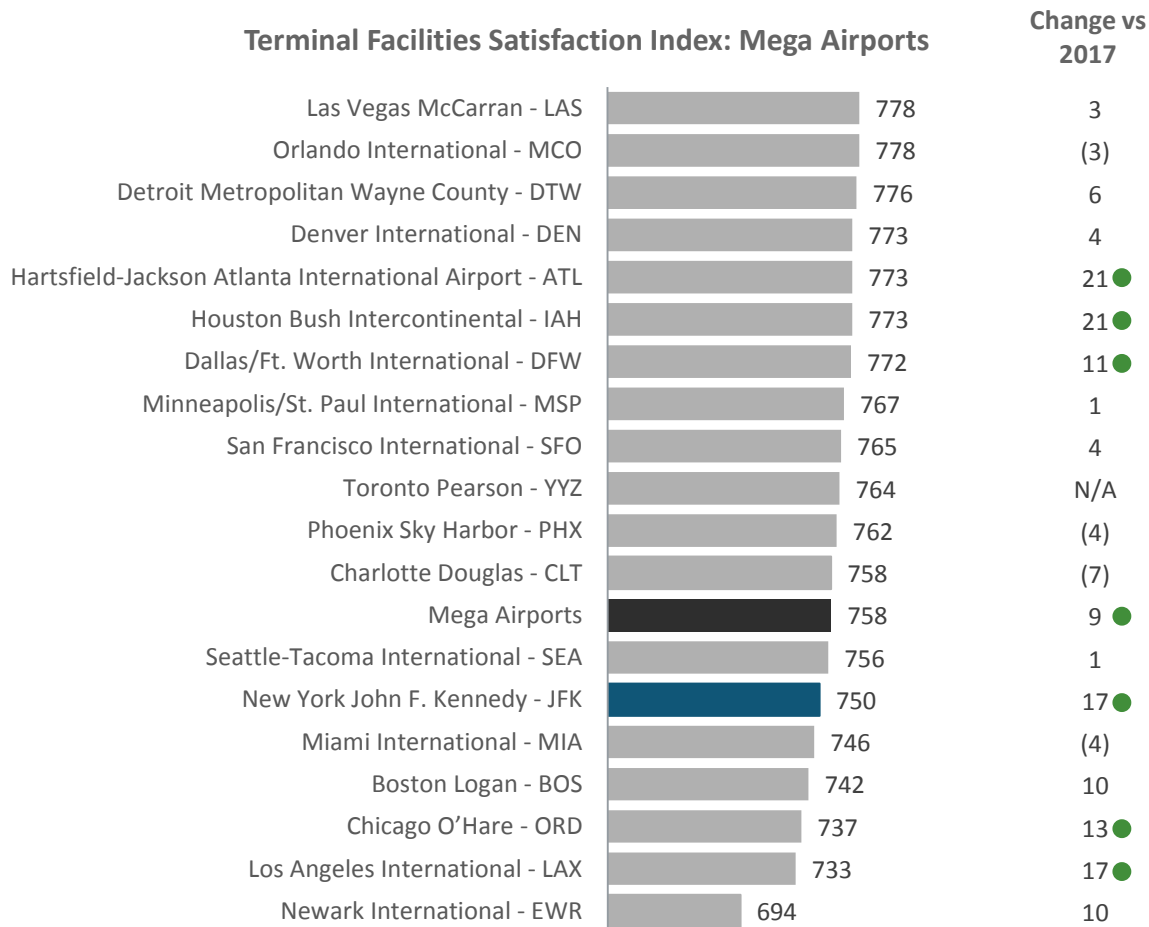
Terminal Facilities

Terminal Facilities Satisfaction

JFK ranks 14th for Terminal Facilities Satisfaction in 2018, consistent with 2017.

JFK makes a significant 17 point improvement year over year, larger than the 9 point significant improvement of the Mega Airport segment

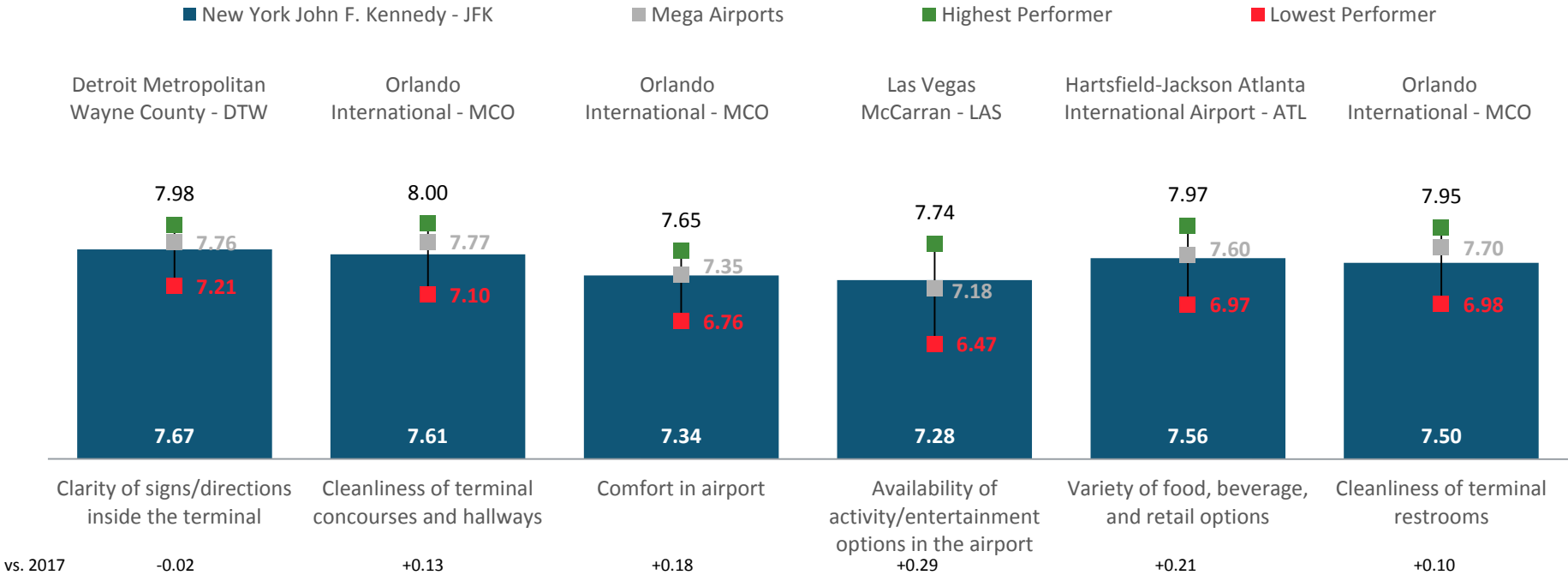
Terminal Facilities Satisfaction Index: Mega Airports



Note: N/A – No relevant 2017 data available due to survey enhancements;
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Terminal Facilities

Attribute Performance

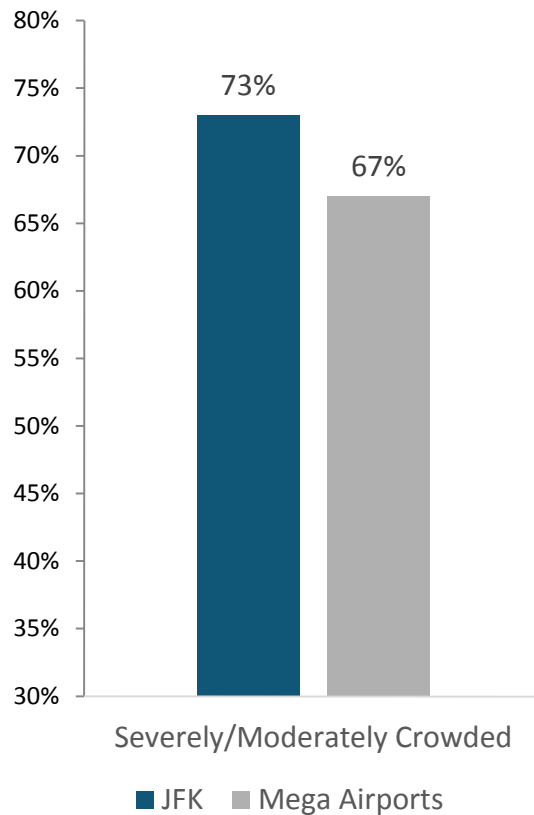


Terminal Facilities

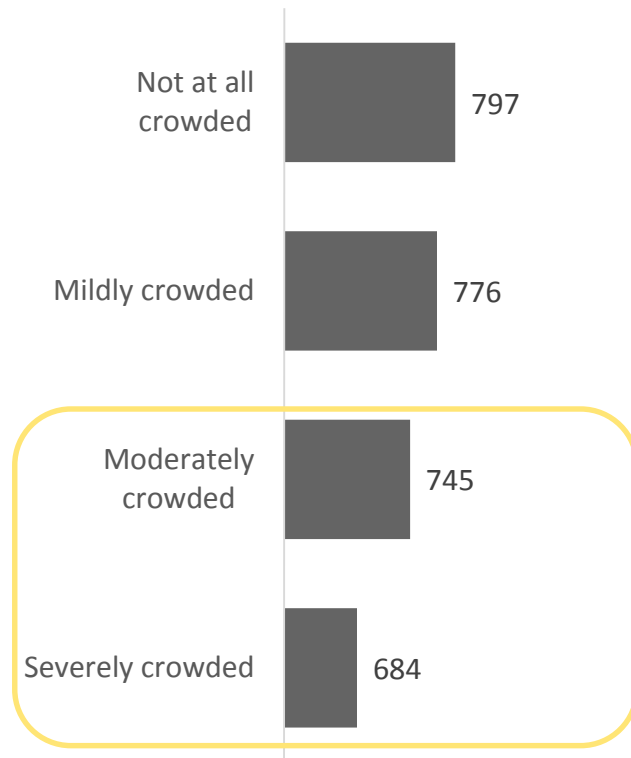
Terminal Facilities satisfaction declines when terminals are perceived as crowded

JFK is perceived as more crowded than other Mega airports

Crowd Within the Airport Terminal



Terminal Facilities Index by Crowding – Total Industry



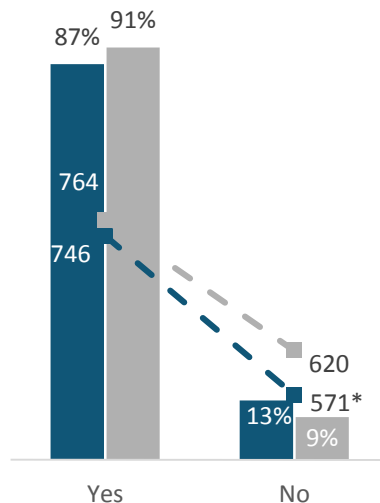
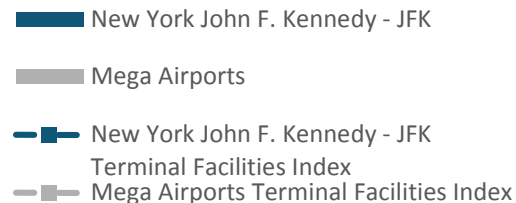
Terminal Facilities

JFK performs below the segment average for restroom cleanliness and adequate signage

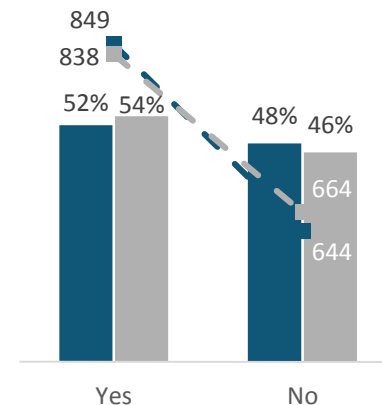
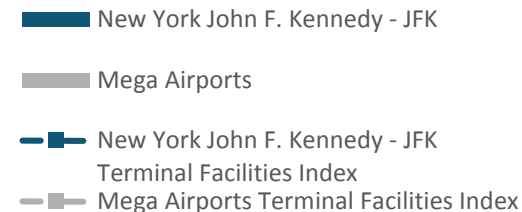
Restroom cleanliness and having clear and adequate signage are two of the most impactful KPIs in the 2018 Airport Satisfaction Study.

Note: *small sample size (n<30-99).

Restroom Cleanliness



Signage Adequate and Easy to Understand

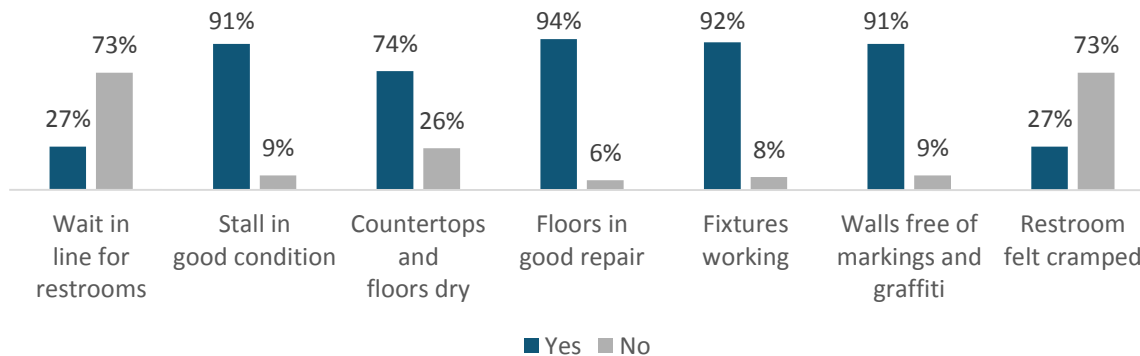


Terminal Facilities

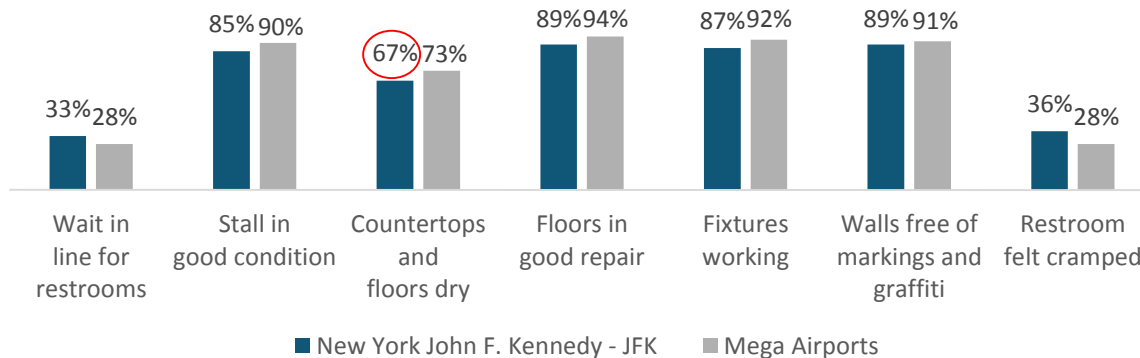
Restroom condition impacts perceptions of cleanliness substantially

Restroom felt cramped is the component with the biggest gap to the Mega airport average

Restroom Clean % Yes by Restroom Components – Total Industry



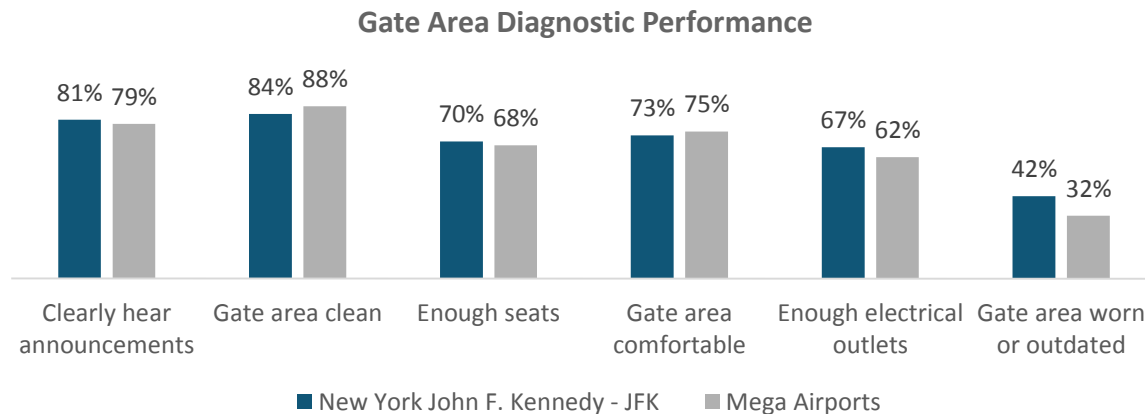
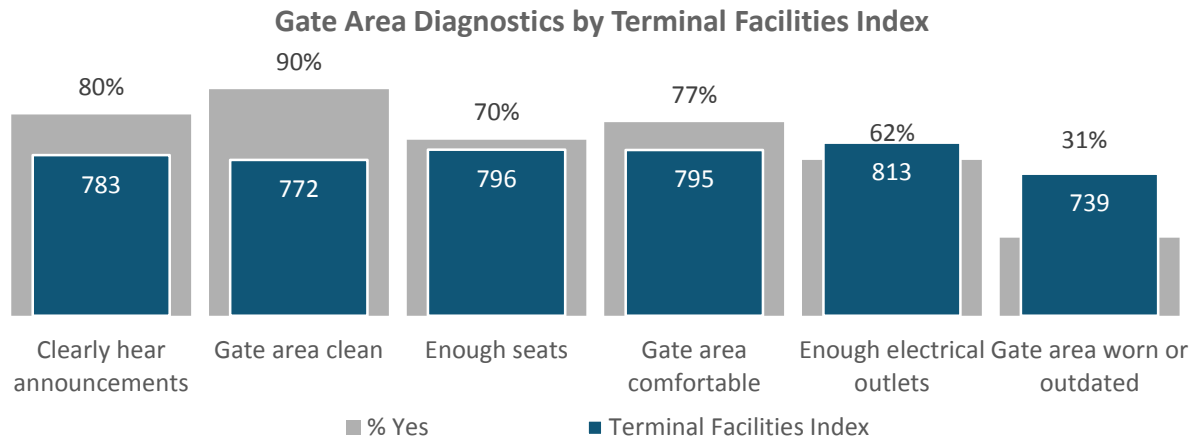
Restroom Components - % Yes



Terminal Facilities

Gate Area Diagnostics – having enough electrical outlets leads to higher terminal facilities satisfaction

Clearly hear announcements, enough seats and enough electrical outlets are gate areas where JFK outperforms the Mega airport average



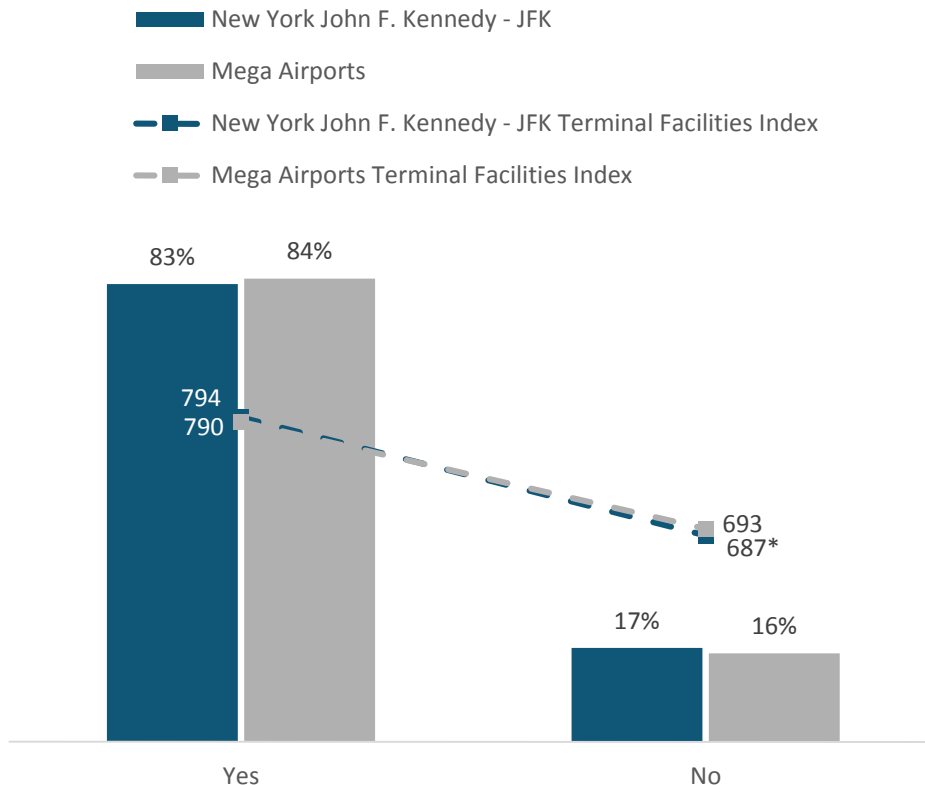
Terminal Facilities

Satisfaction is 97 points higher when Wi-Fi is faster or as fast as expected at Mega airports

84% of mega airport passengers state the Wi-Fi was faster than or as fast as expected and 83% of JFK passengers state the same.

Note:*small sample size (n=30-99).

Wi-Fi Connection Faster Than or As Expected





Baggage Claim

Baggage Claim Satisfaction

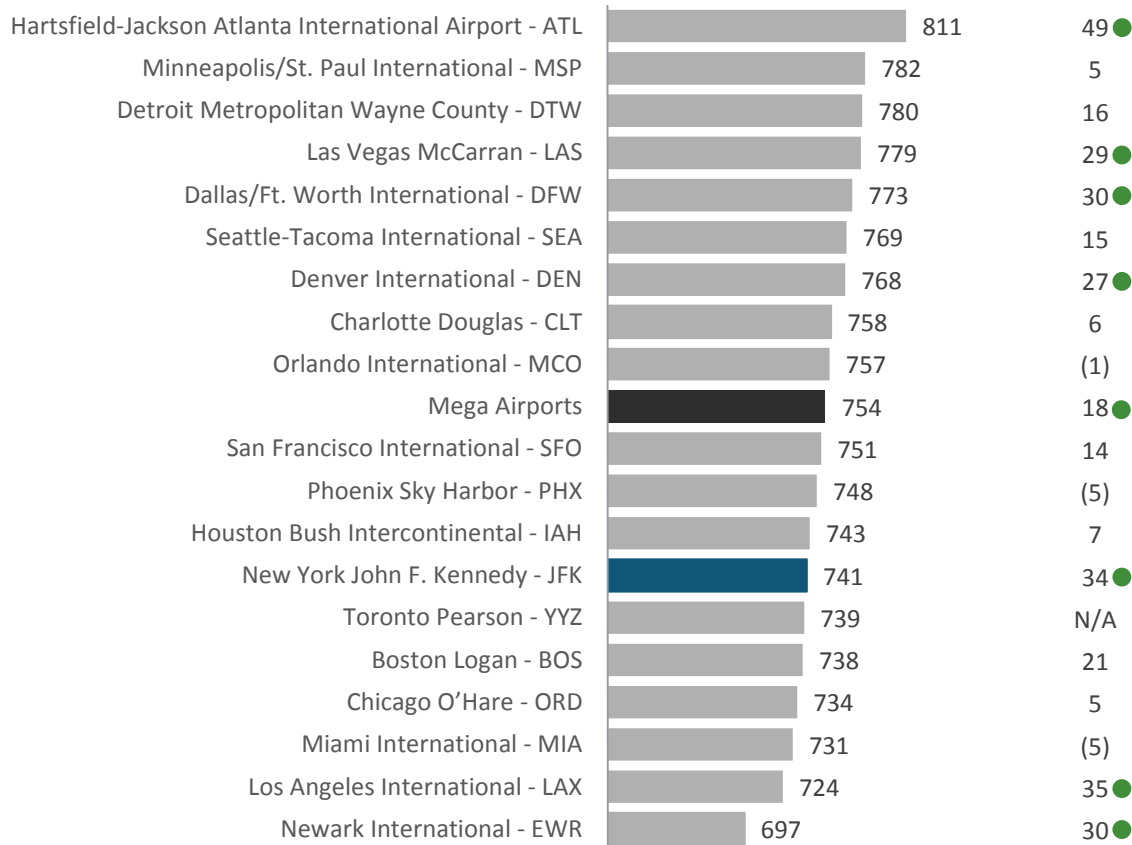
JFK ranks 13th for Baggage Claim Satisfaction, an improvement from ranking 16th in 2017

JFK makes a significant 34 point improvement year over year, greater than the 18 point significant improvement of the Mega Airport segment

Note: N/A – No relevant 2017 data available due to survey enhancements;
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Baggage Claim Satisfaction Index: Mega Airports

Change vs
2017



Baggage Claim

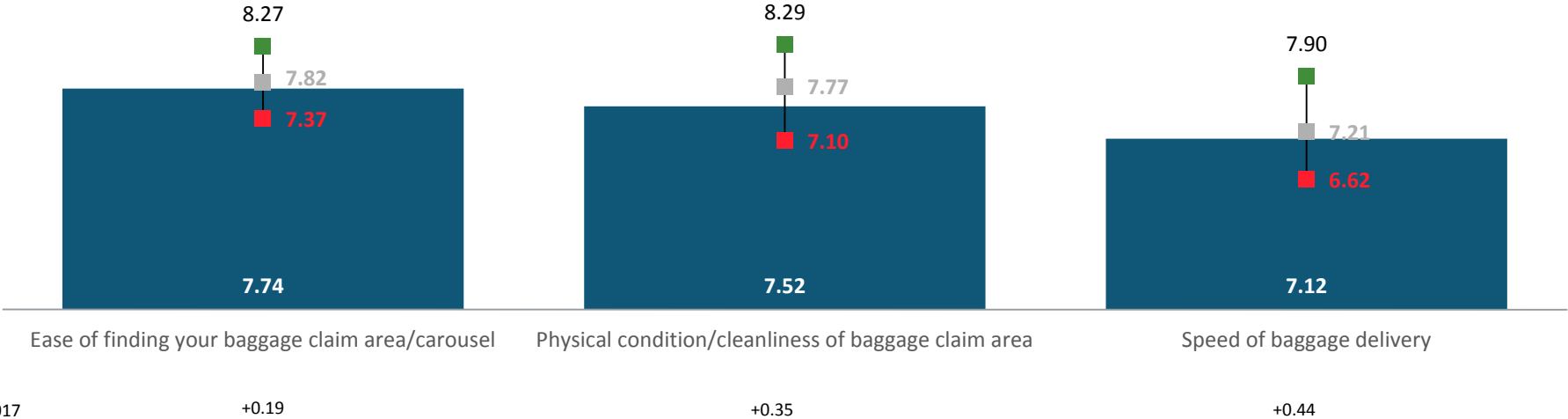
Attribute Performance

■ New York John F. Kennedy - JFK ■ Mega Airports ■ Highest Performer ■ Lowest Performer

Hartsfield-Jackson Atlanta
International Airport - ATL

Hartsfield-Jackson Atlanta
International Airport - ATL

Hartsfield-Jackson Atlanta
International Airport - ATL

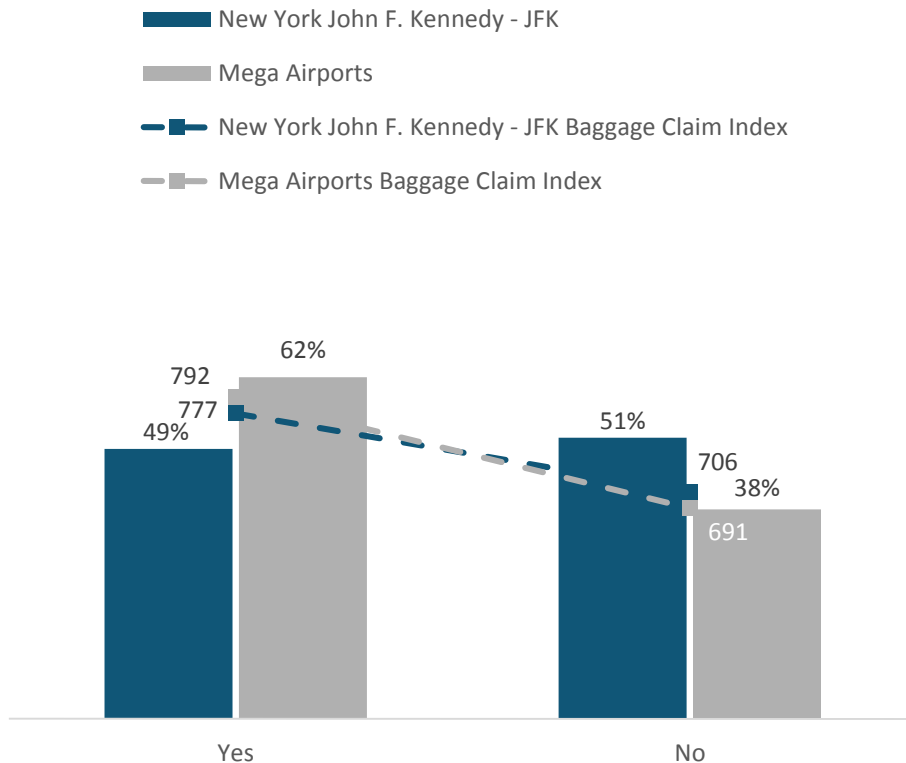


Baggage Claim

Receiving baggage in 16 minutes or less, leads to overall satisfaction that is 101 points above those receiving baggage in 16 minutes or more for the Mega airport segment

Only 49% of passengers at JFK receive baggage in 15 minutes or less compared to 62% for the Mega airport segment

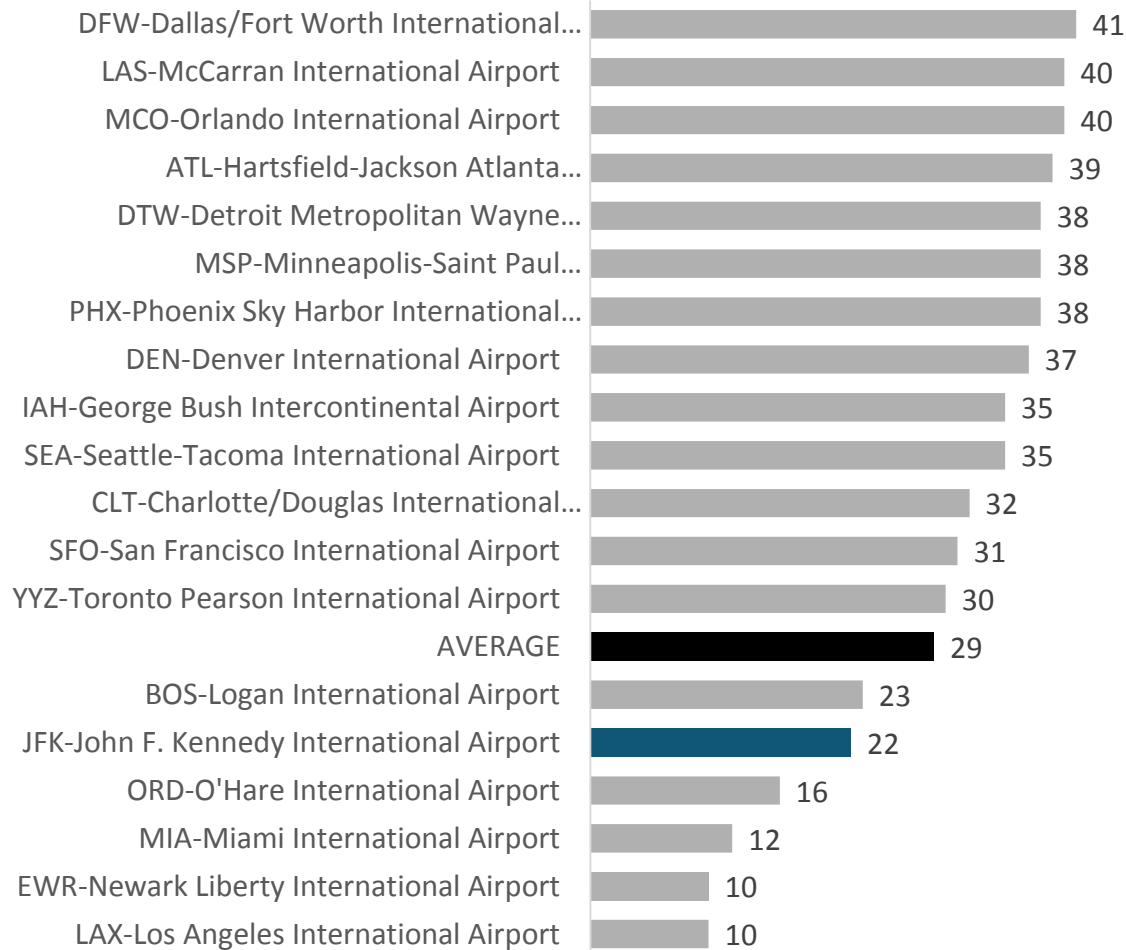
Waited Less than 16 Minutes in Baggage Claim Area for Baggage Claim





NPS Scores – Mega Airport Segment

Both JFK and EWR have room for improvement in overall NPS compared to the Mega Airport segment.



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