



# J.D. POWER

2019 Airport Satisfaction Study<sup>SM</sup>



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## Key Insights

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

### **LGA ranks 27<sup>th</sup> in the Large Airport segment**

*LGA ranked 24<sup>th</sup> in 2018 but three additional airports were added to the segment*

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**LGA's renovation project is the most disruptive construction  
project in the 2019 study**

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**Temporary signage during construction can be improved**

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**LGA passengers are waiting for their bags one minute less than  
the average Large airport passenger but crowds and  
construction are impacting satisfaction at Bag Claim**

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**“Variety of Food and Beverage” is overperforming other  
attributes at LGA**

## 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 LGA 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



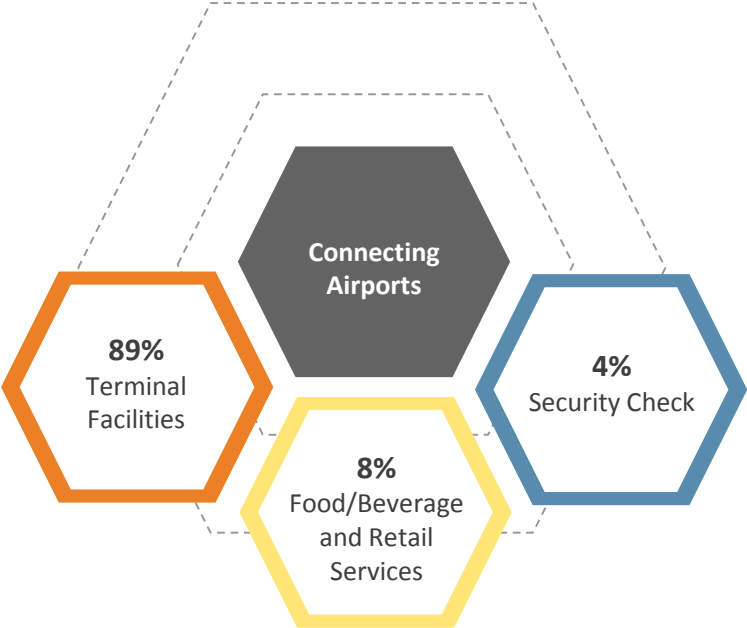
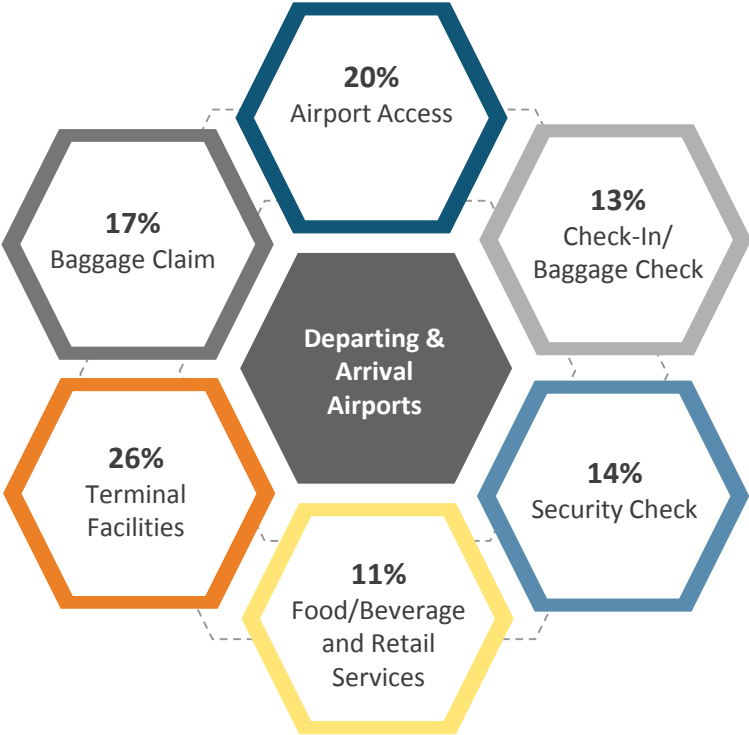
Minimum 100 completes  
for rank eligibility

\*small sample (30<n<99)

#insufficient sample (n<30)



Survey Methodology - Factor Weights



Percentages may not equal 100% due to rounding.

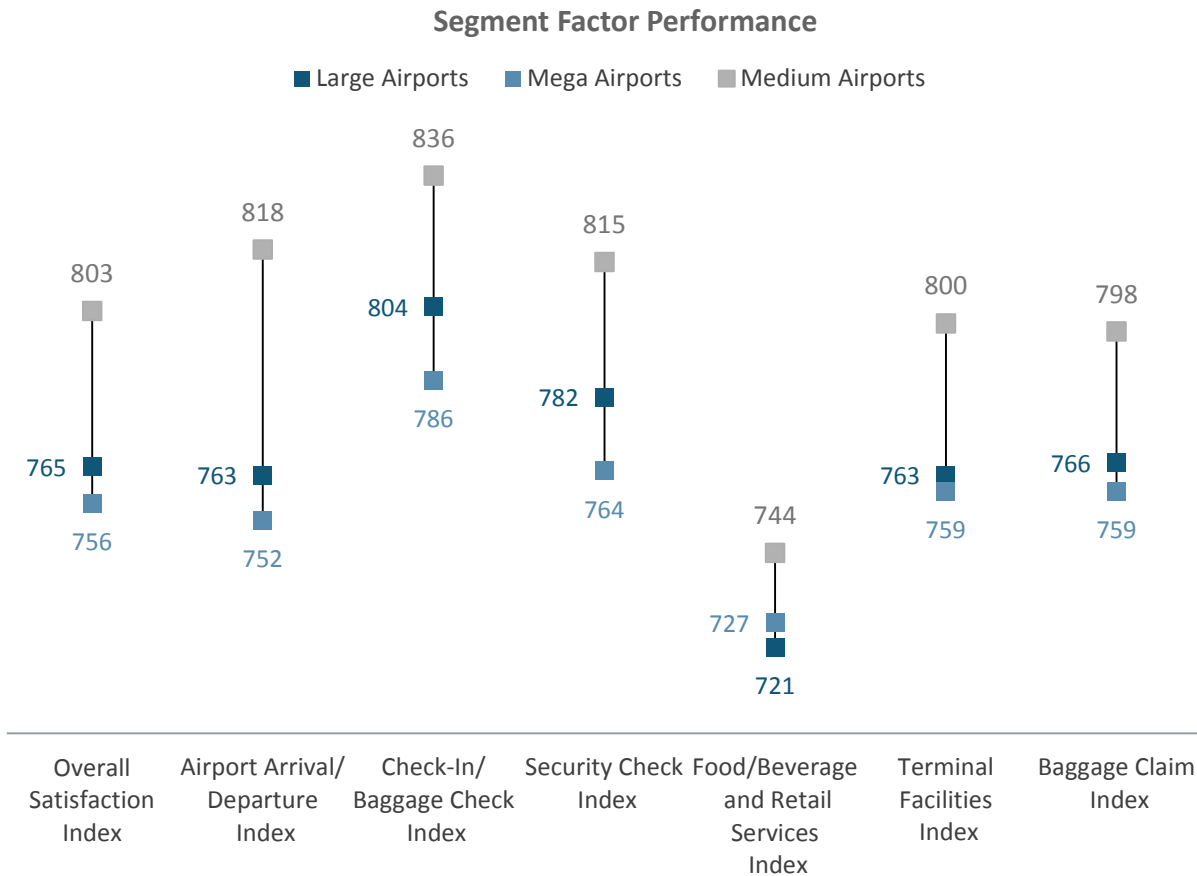


## Overall Performance

## Segment Factor Performance

Large airports have a disadvantage in Food/Beverage and Retail Services

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



## Overall Satisfaction

### LGA ranks 27<sup>th</sup> in Overall Satisfaction within the Large Airport segment

LGA ranked 24<sup>th</sup> in 2018, but has shifted in 2019 due to the addition of 3 airports to the Large segment in 2019.

#### Passengers say:

Many mentions of construction but starting to notice renovations...

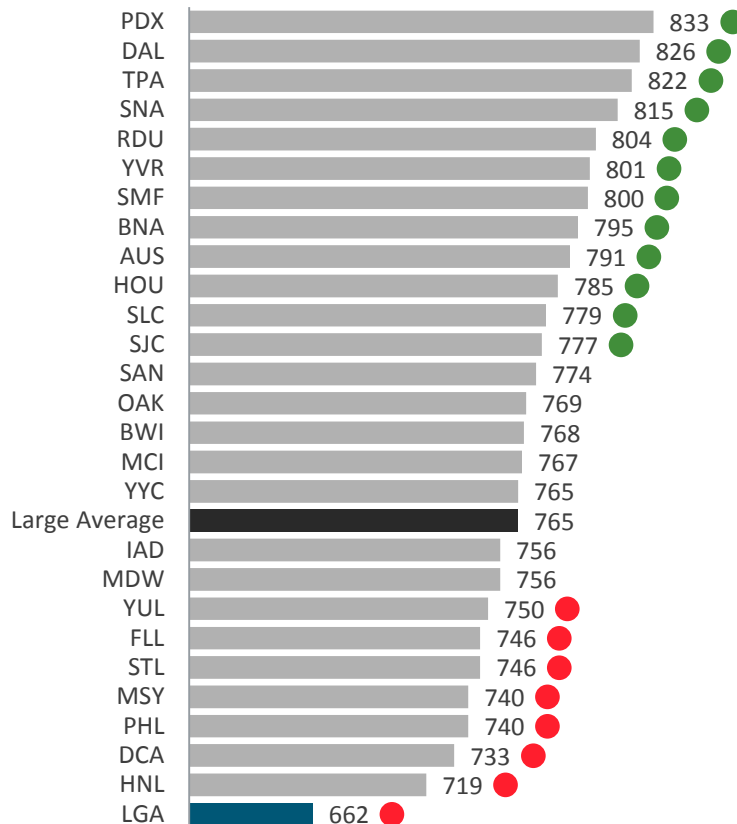
*"It is always under construction and hard and time consuming to navigate"*

*"Too crowded, hard to arrive and depart"*

*"we flew into the new wing, it was really nice"*

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

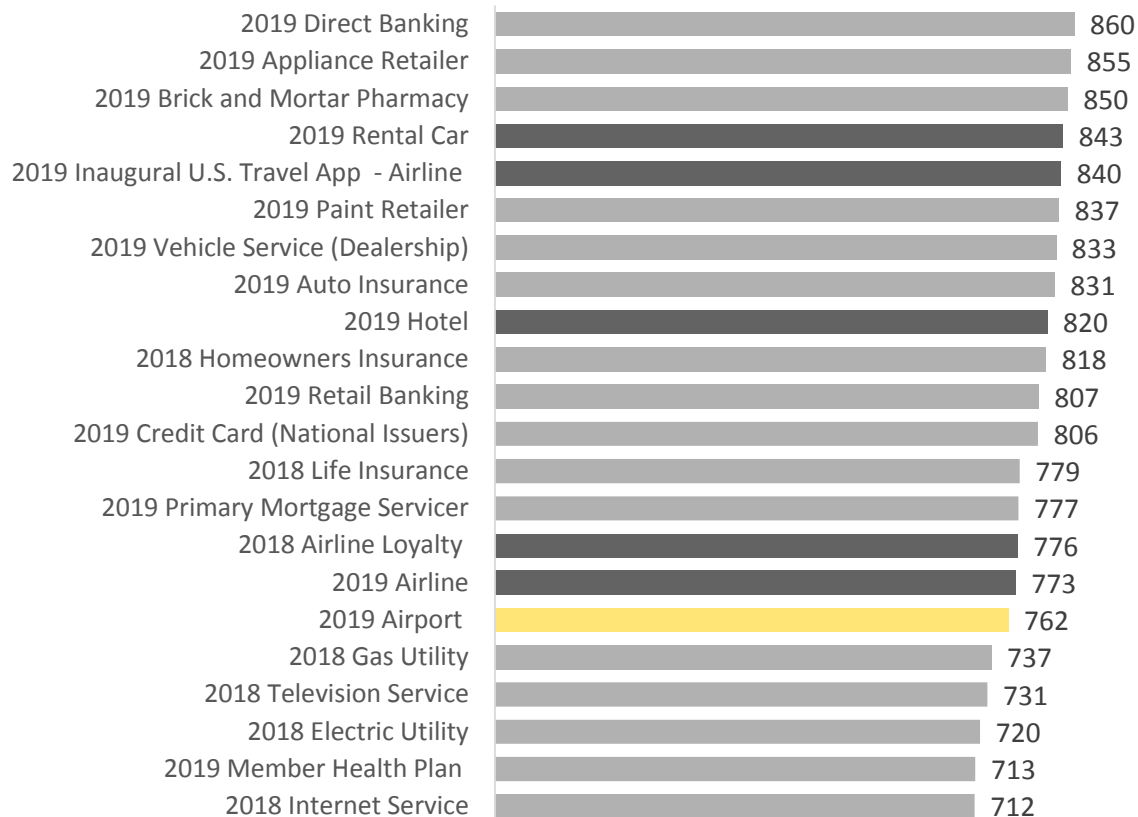
## Overall Satisfaction Index: Large Airports



## How Do Airports Stack Up?

Airport satisfaction is on par with Airline satisfaction but lower than Airline Apps

### Cross Industry Rankings (Service Industries)





## Factor Performance

LGA scores below the large airport average in all factor areas

Access (the 2<sup>nd</sup> most important factor in the study) is the lowest performing area for LGA by far.

## Factor Performance

	LGA	Large Airports	PDX
Overall Satisfaction Index	662	765	833
Airport Access Index	588	763	835
Check-In/Baggage Check Index	719	804	853
Security Check Index	717	782	829
Food/Beverage and Retail Services Index	638	721	806
Terminal Facilities Index	659	763	837
Baggage Claim Index	708	766	838

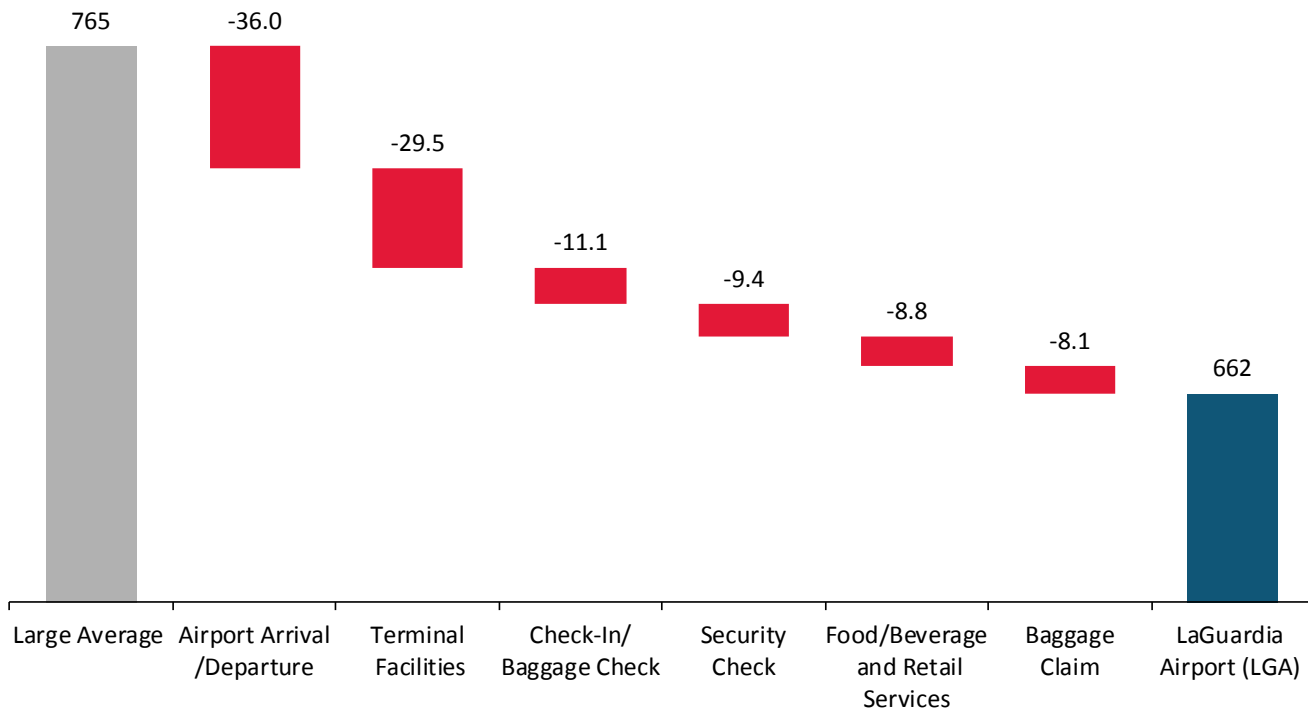
\*Small sample size (n=30-99); #Insufficient sample size (n<30).

## SWOOP Brand vs. Segment

Compared to the Large Airport average, LGA's greatest opportunity is in Access

LGA's current renovation is the most disruptive project in the study. (This may be eclipsed by LAX's renovation starting this calendar year.)

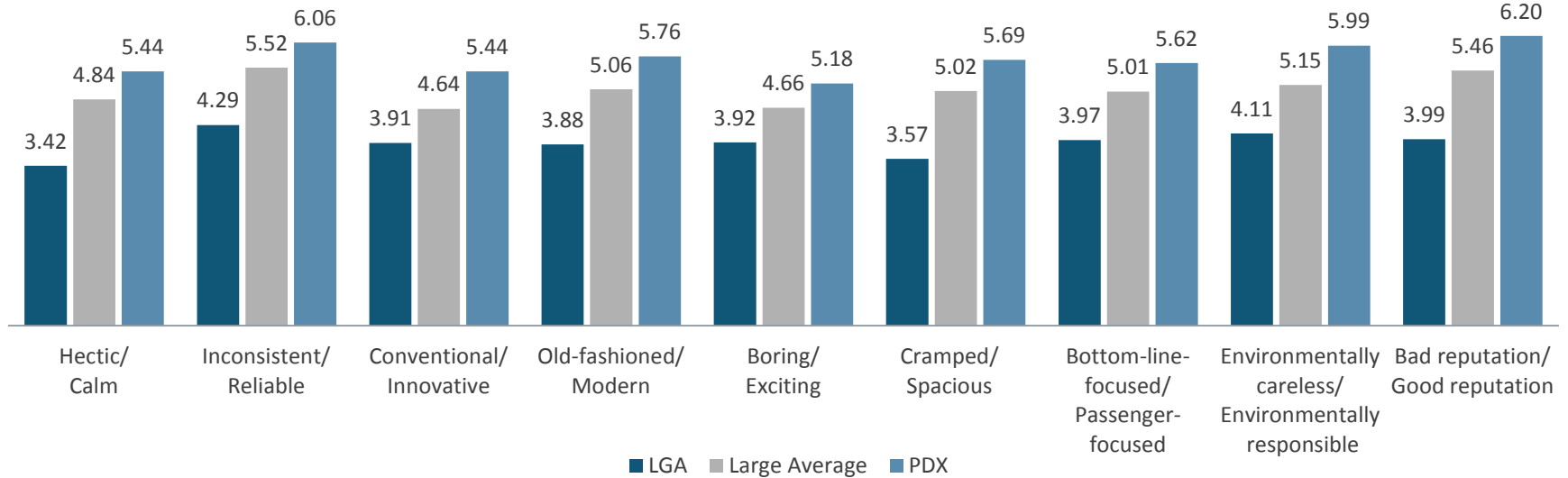
## Weighted Gaps – Client vs. Segment Airport Average



## Brand Image

LGA is perceived as substantially more hectic and cramped than other large airports

### Brand Image Performance



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

## The ROI of Satisfaction

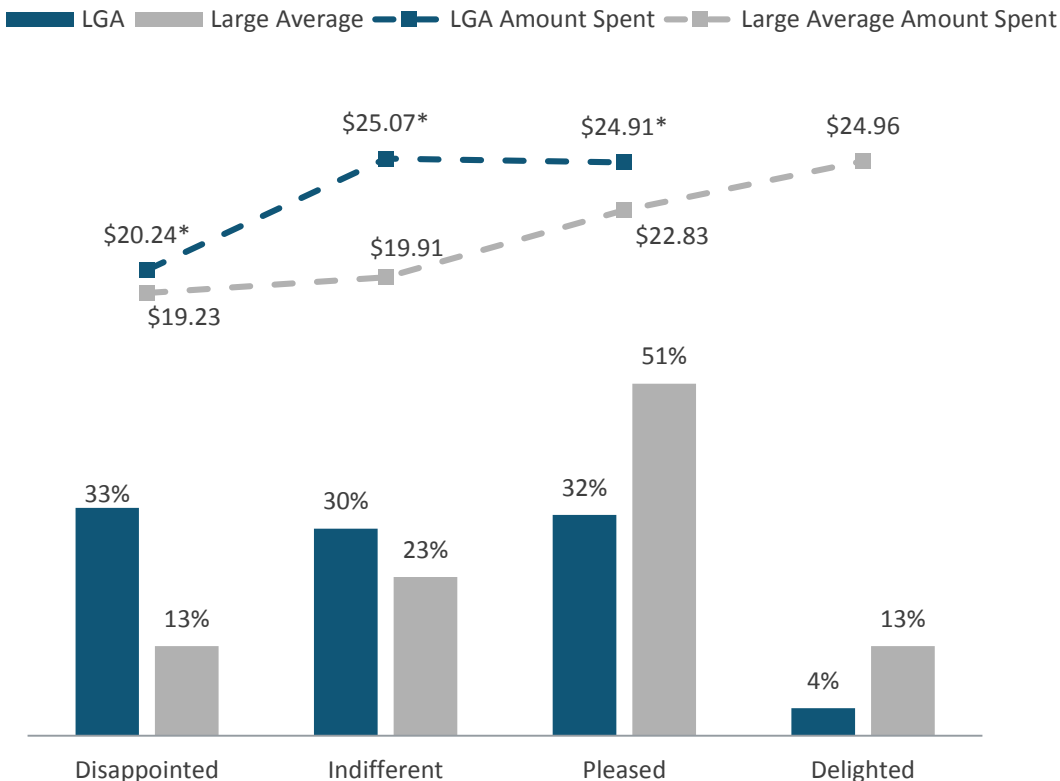
### Delighted passengers spend more

LGA passengers on average spend \$23 in the terminal with Large airports averaging \$22 in terminal spend.

Large airports on average have more delighted and pleased passengers than LGA.

\*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

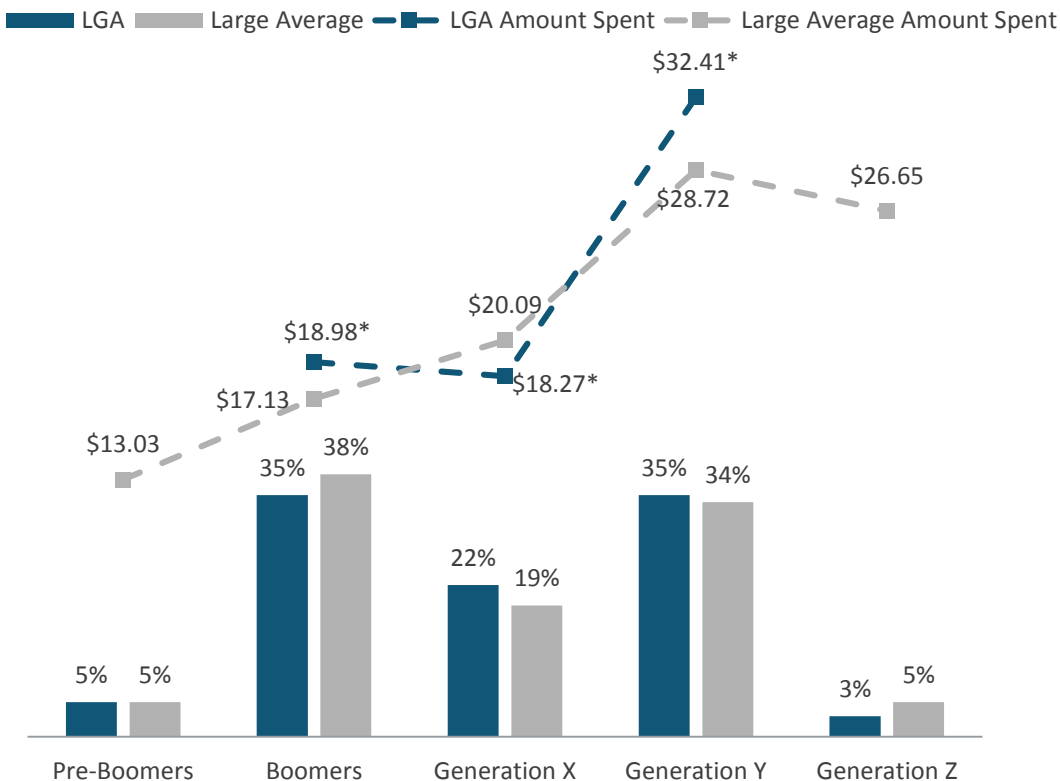


## The ROI of Satisfaction

Younger generations tend to spend more at airports than older generations

LGA has a similar profile of passengers by generation to the Large airport average.

## Generation and In Terminal Spending

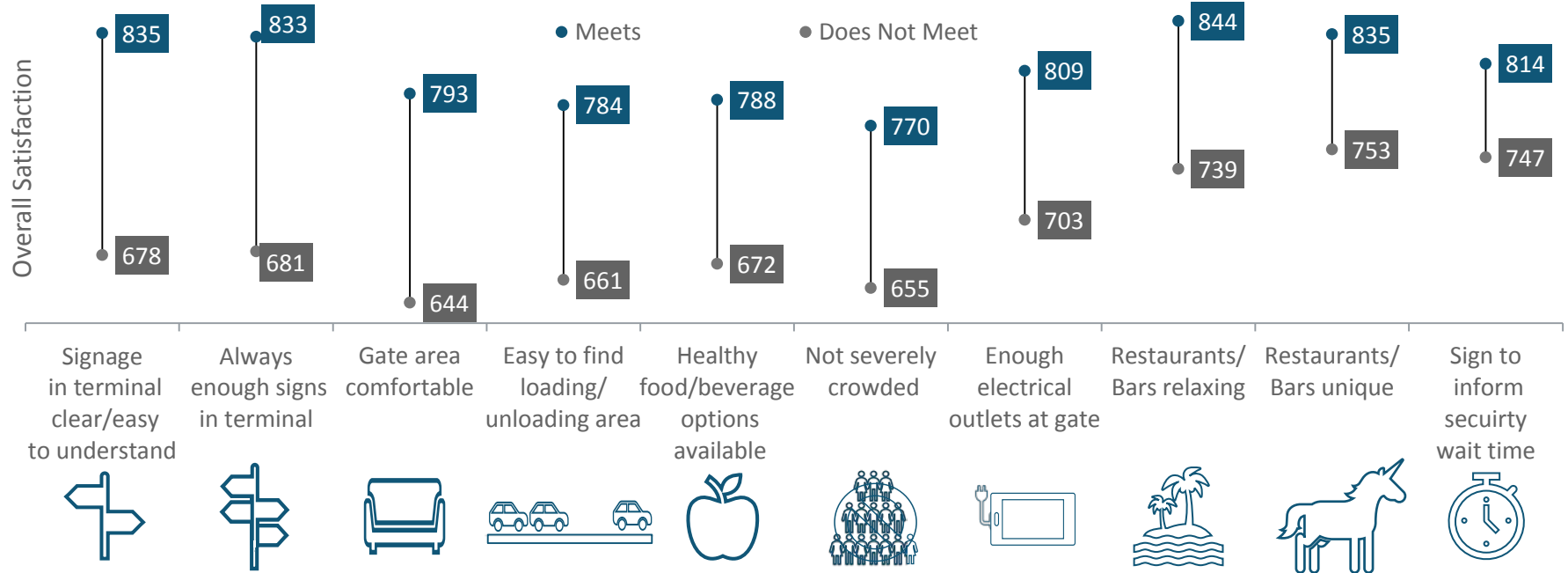


\*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30)

## Key Performance Indicators

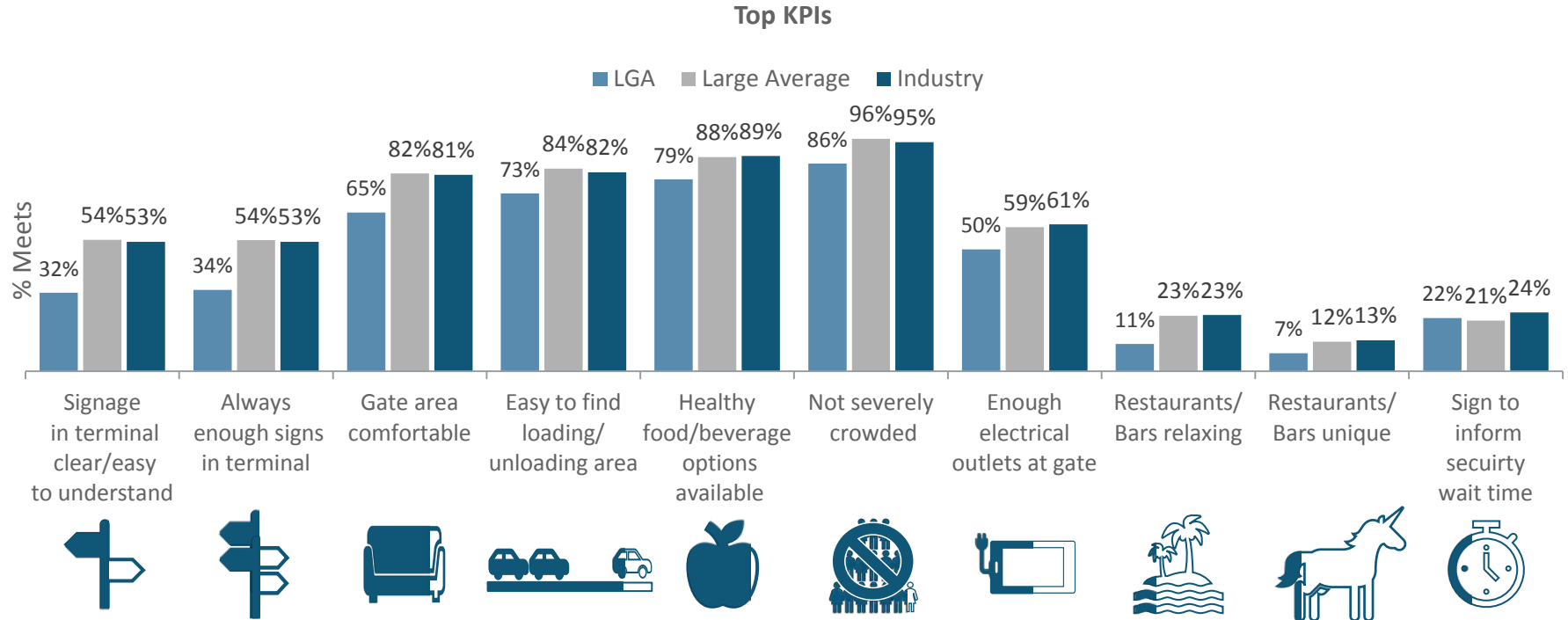
These KPIs have a high impact on Overall Satisfaction, boosting scores 67-157 points

### Top KPIs Overall Satisfaction Impacts – Total Industry



## Key Performance Indicators

# Terminal signage during renovation is significantly deficient



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

### LGA ranks 27<sup>th</sup> in Airport Access

*“Difficult to arrive and depart”*

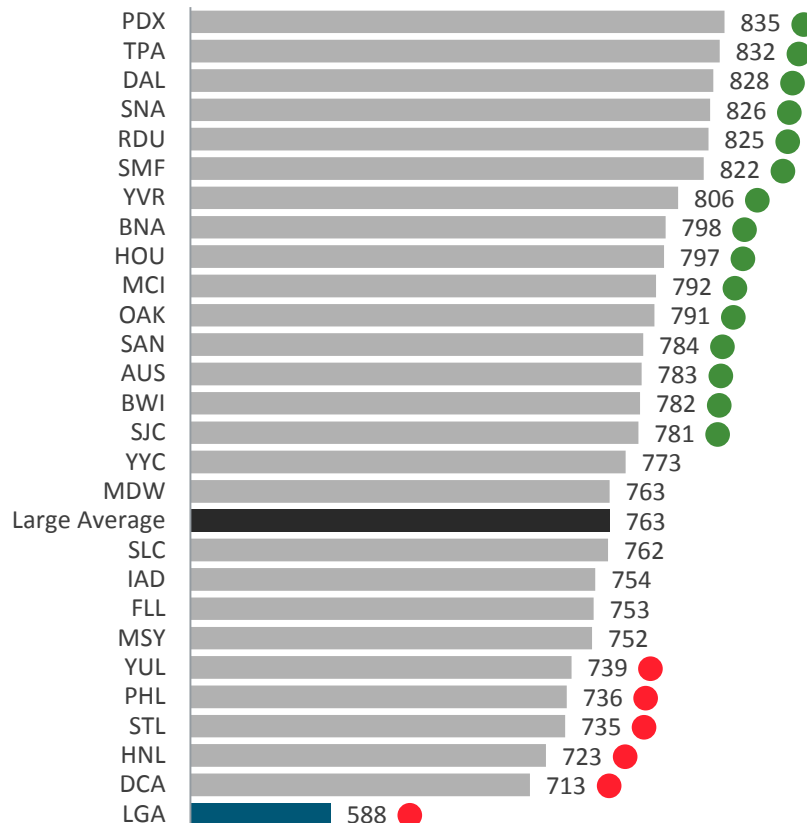
*“It is under construction and the traffic is horrible. Took 2 hours to get a shuttle bus to the rental car lot.”*

*“LGA is being renovated, so there is a lot of construction traffic, making getting in and out of the airport difficult”*

*“Clearer understanding of where to temporary taxi stand was. Also would've been helpful to know in advance that construction would delay my trip to Manhattan by 45 minutes (of course, Delta would've had to alert me about this, not LGA) ”*

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

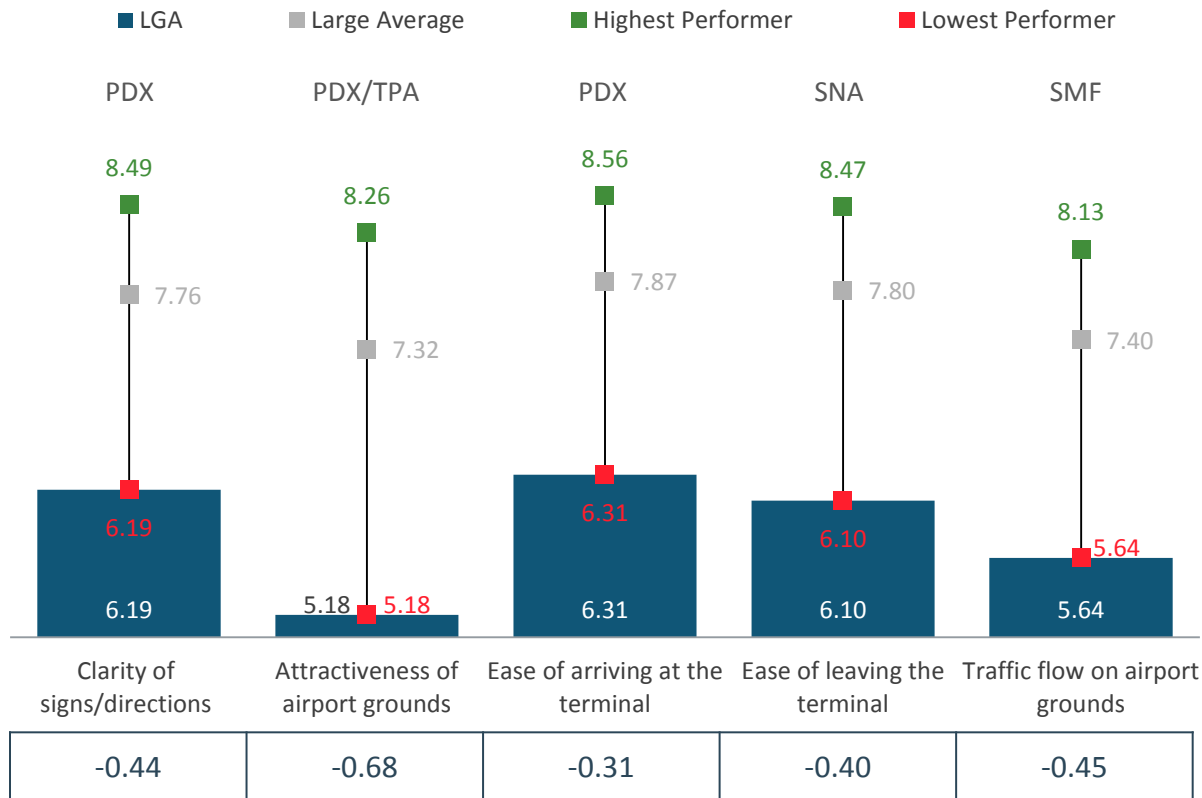
## Airport Access Index: Large Airports



## Airport Access

LGA is the lowest performer for all Access attributes

## Attribute Performance



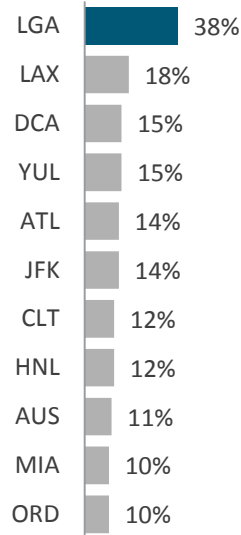
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## Airport Access

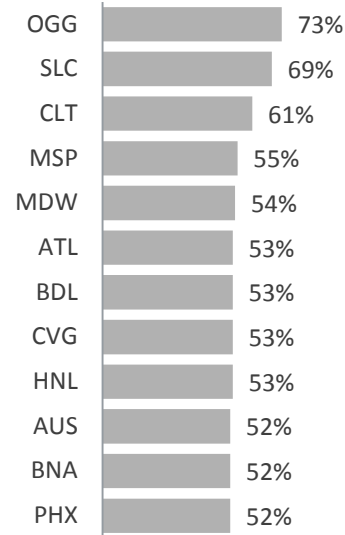
Airport Access satisfaction is 116 points lower when construction delays access to the airport.

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

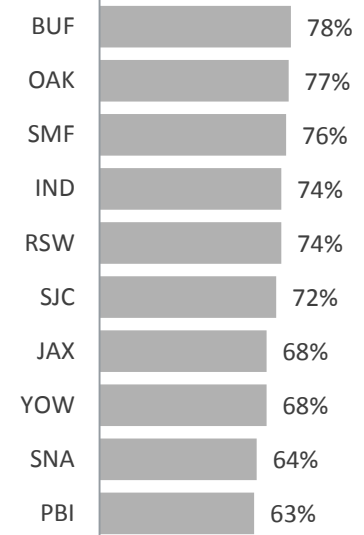
**Construction Present and Delayed  
Access**



**Construction Present – Did Not Delay  
Access**

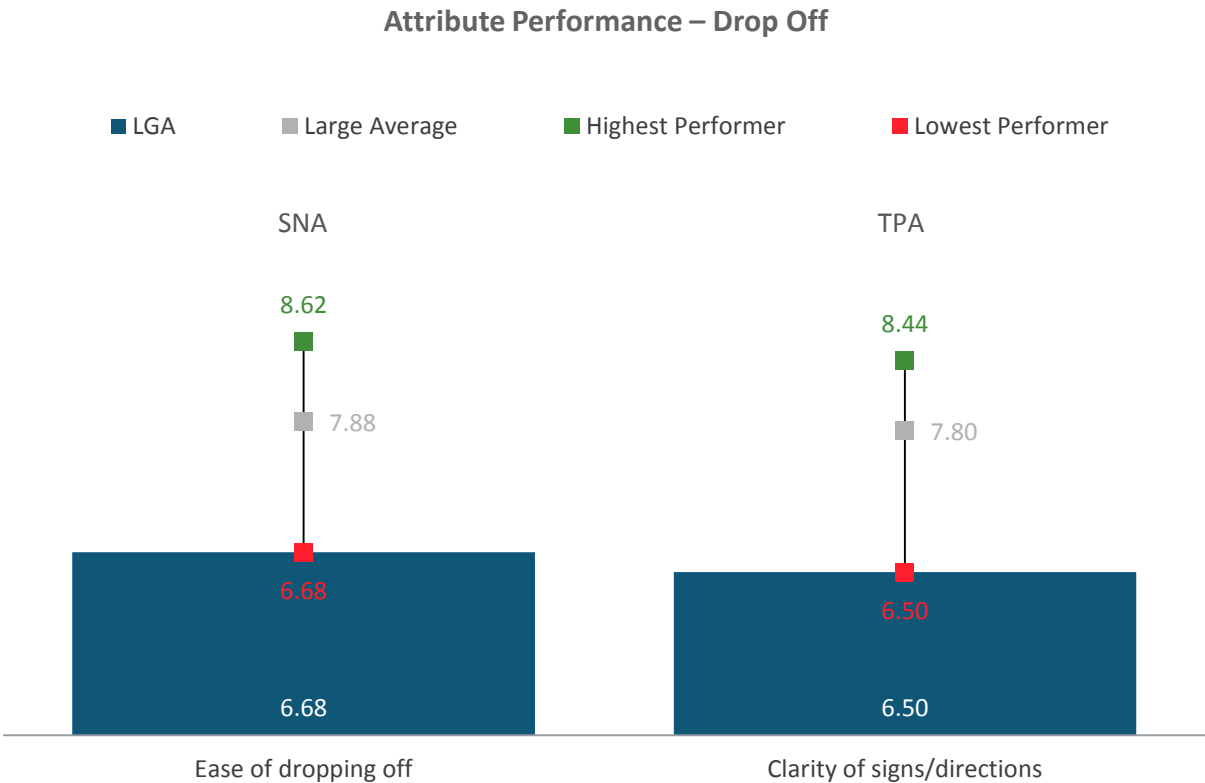


**Did Not Notice Construction**



LGA's renovation is the most disruptive construction project in the study.

LGA is the lowest performer for drop off



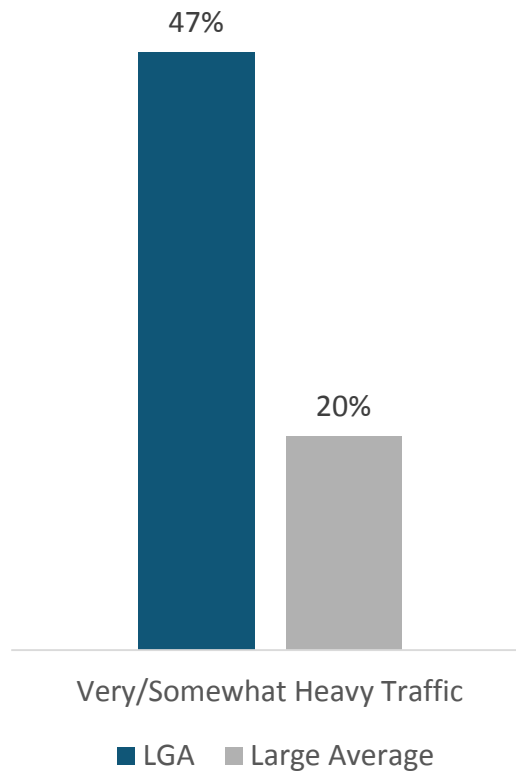
\*Small sample size (n=30-99); #Insufficient sample size (n<30).

## Airport Access

### Traffic congestion impacts Airport Access Satisfaction

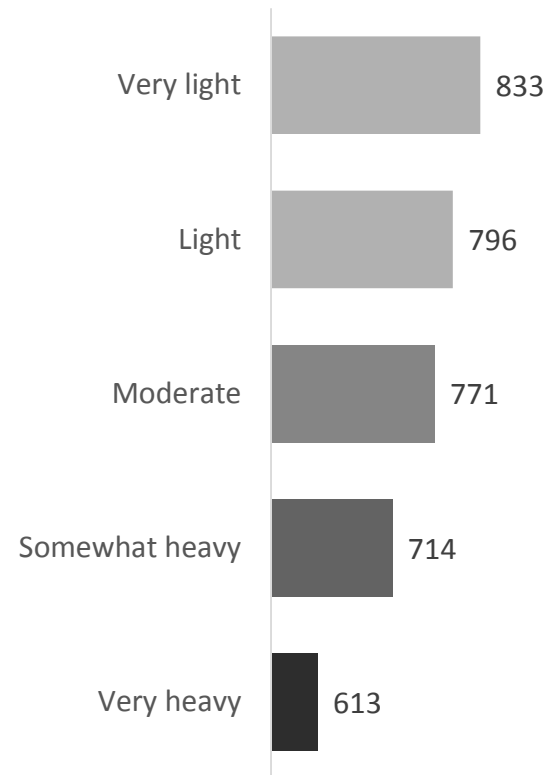
LGA (47% - Large Category) and LAX (56% - Mega Category) have the highest traffic congestion getting to the airport.

#### 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

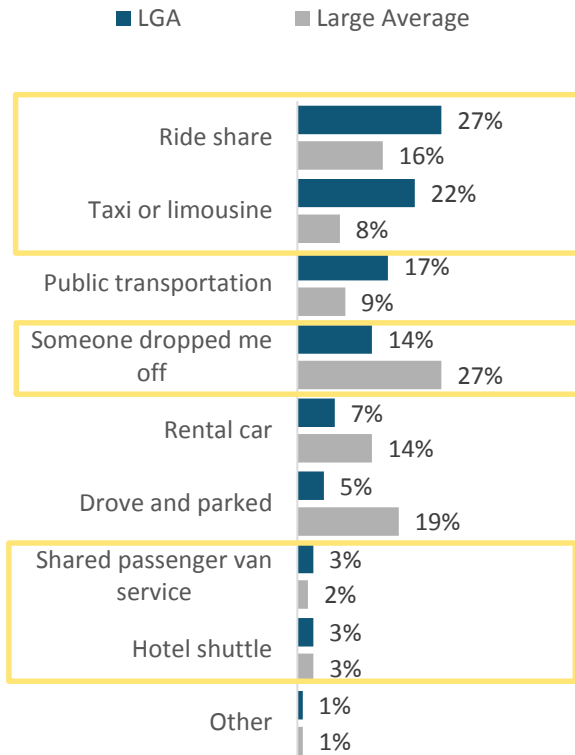


## Airport Access

Airport Access is 186 points higher when passengers are able to easily find curb space at Large airports

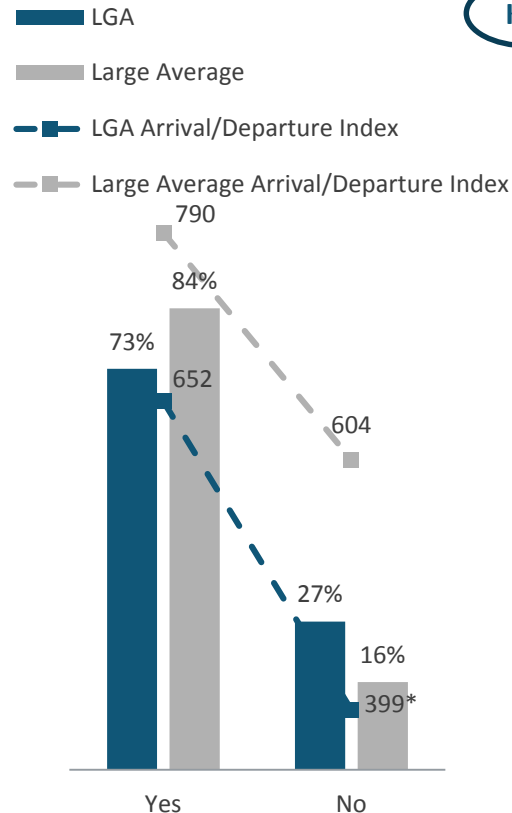
Highlighted responses are those that answer the question “was it easy to find curb space upon arrival?”

## 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

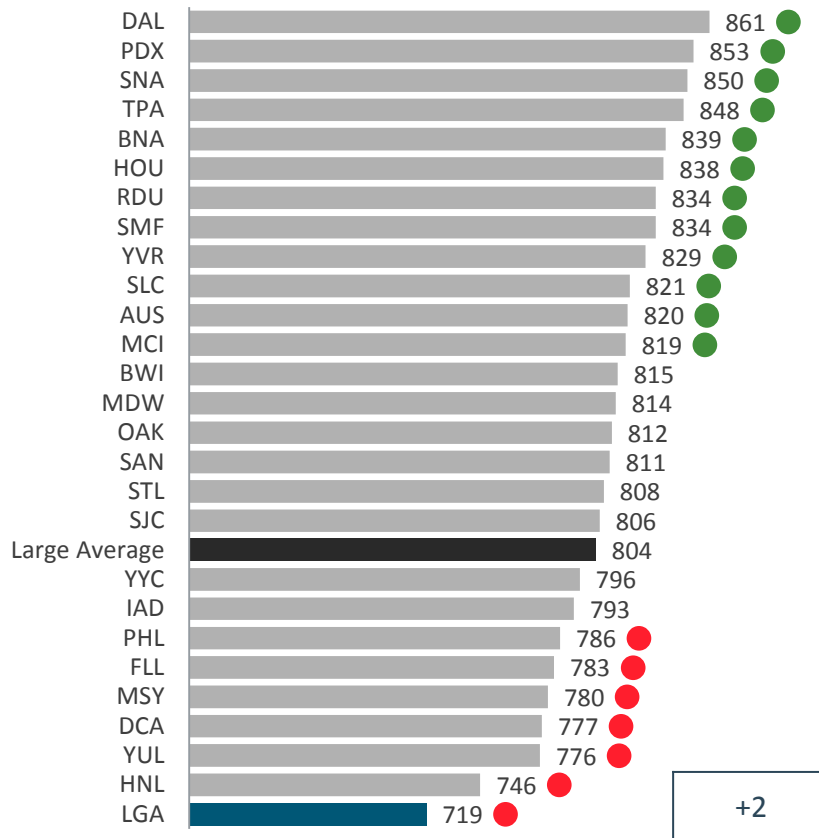
LGA ranks 27<sup>th</sup> in Check-In/Baggage Check, related to poor Access evaluations

*"The checking in still takes long and during early flights not enough employees are available to help with check in and security checks."*

*"always busy long lines to check in"*

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

## Check-In/Baggage Check Index: Large Airports

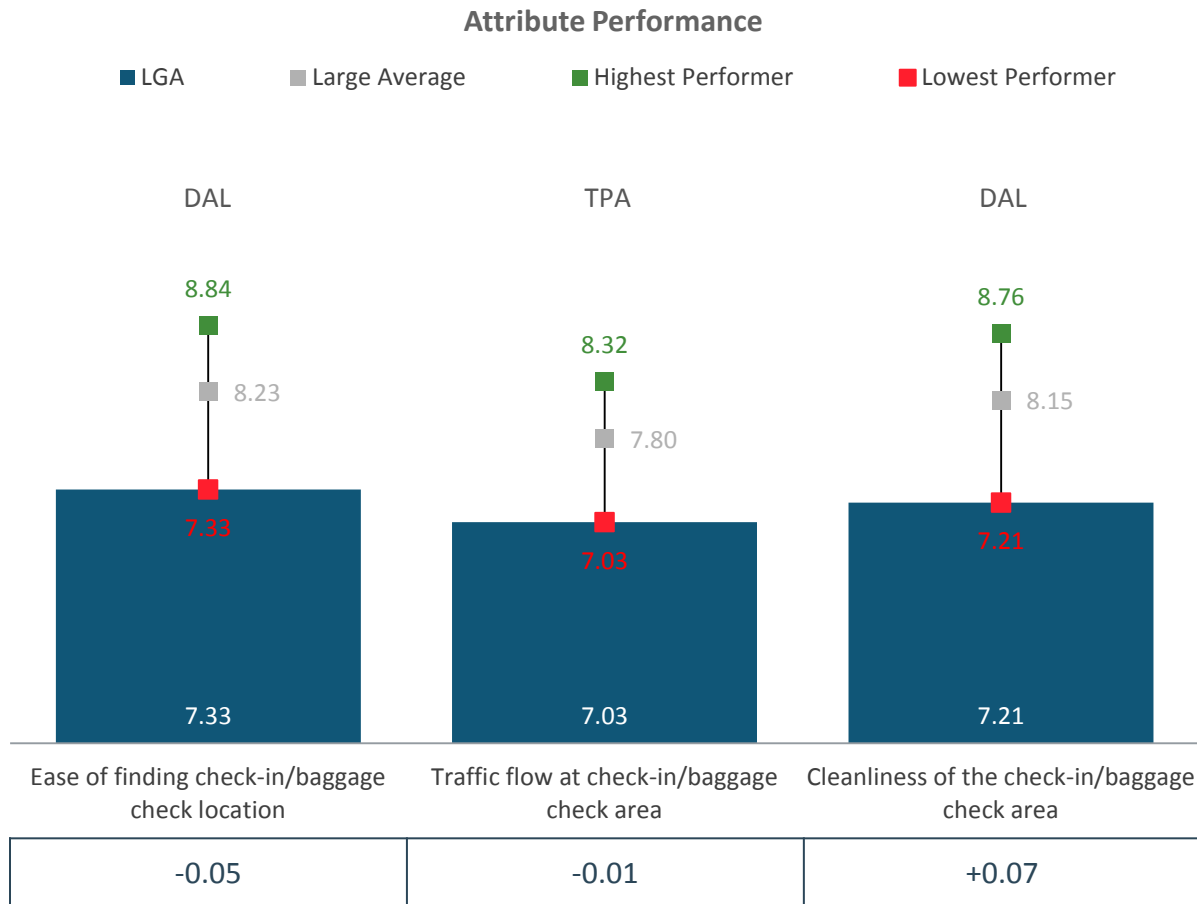


+2



## Check-In/Baggage Check

LGA is the lowest performer in all Check-In/Baggage Check attributes



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

## Check-In/Baggage Check

LGA passengers are most satisfied with Check-In/Baggage check when they use curbside or check in at the main counter

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

LGA	Curbside	Self check-in kiosk	Main counter	Online
Ease of finding check-in/baggage check location	8.01*	7.16	7.60*	7.02*
Traffic flow at check-in	7.80*	6.90	7.27*	6.67*
Cleanliness of check-in area	7.41*	7.04	7.48*	7.08*

Large Average	Curbside	Self check-in kiosk	Main counter	Online
Ease of finding check-in/baggage check location	8.58	8.22	8.19	8.19
Traffic flow at check-in	8.16	7.81	7.77	7.73
Cleanliness of check-in area	8.19	8.16	8.19	8.11

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



## Security Check

## Security Check Satisfaction

LGA ranks 27<sup>th</sup> in Security Check, scoring 18 points behind 26<sup>th</sup> ranked HNL

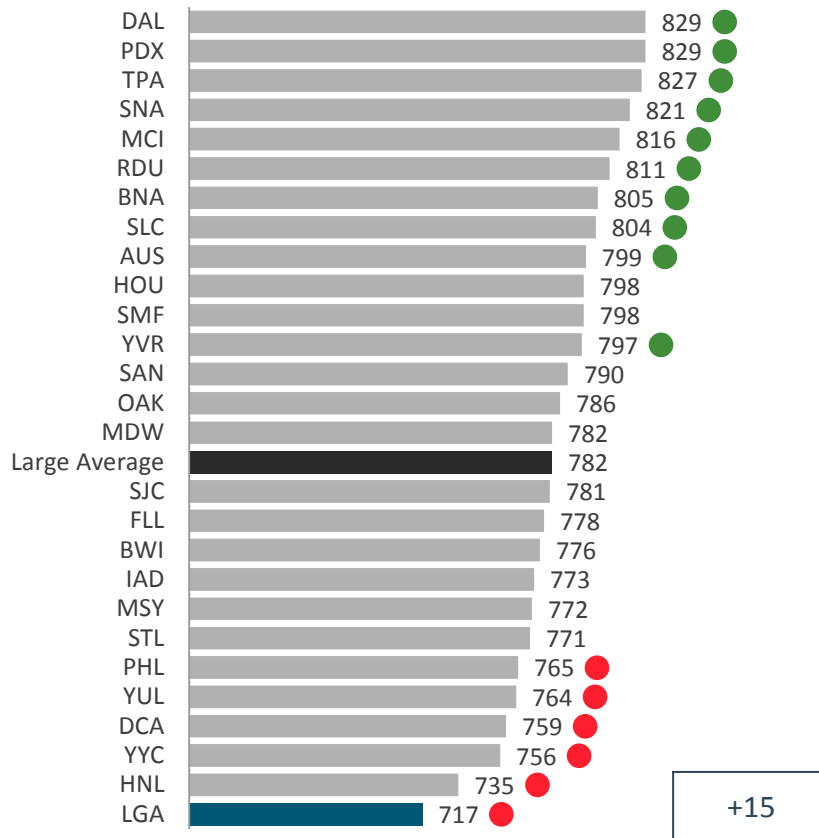
*"Also, the TSA and other employees here are the most unfriendly I've ever encountered at any airport in the world."*

*"Long TSA Lines for Pre-Check passengers"*

*"I like the Amex lounge but it's before security so it's stressful as I never know how long the TSA line would be (sometimes there is no TSA!) so I never go because I'm stressed with time. If lounge was after security it would be much more enjoyable."*

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

## Security Check Index: Large Airports



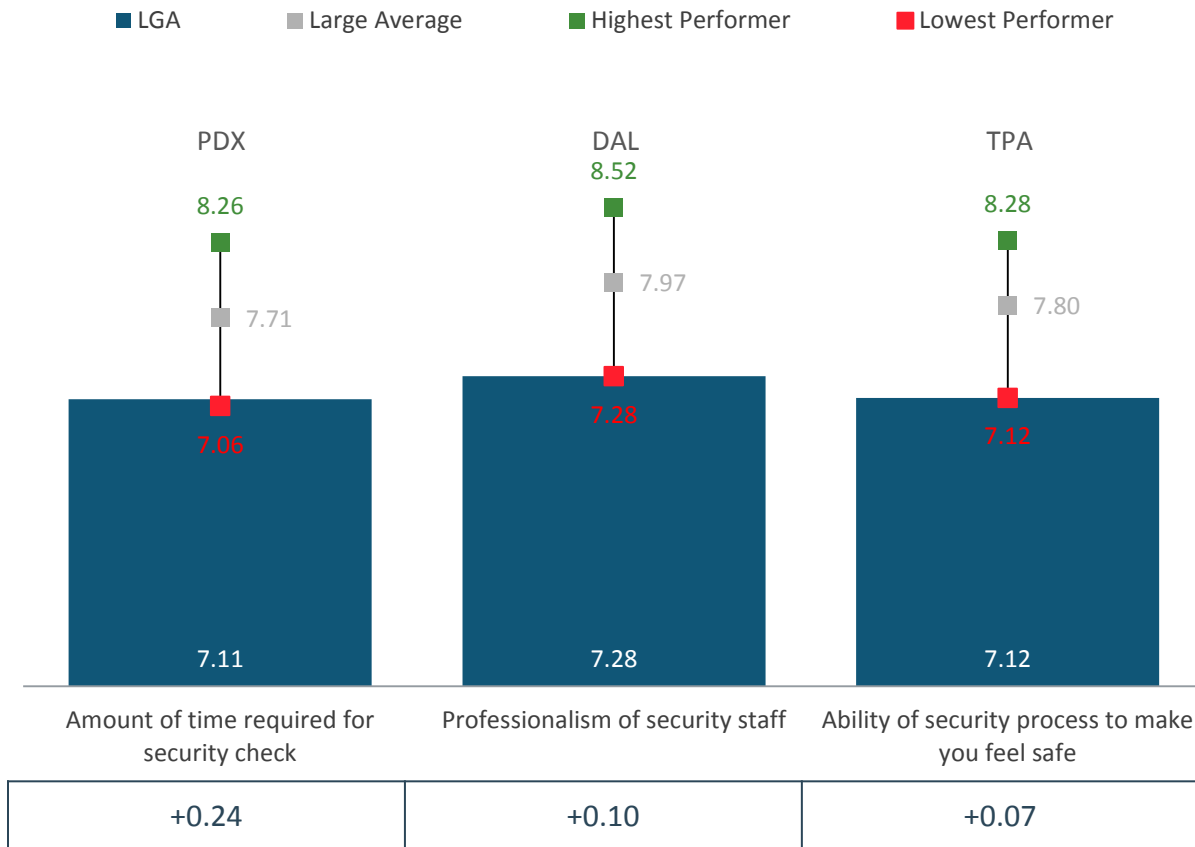
## Security Check

LGA performs slightly above HNL in *Amount of time required for security check*

Poor performance in Security is also be influenced by Access... delayed Access makes TSA wait times seem longer for the passenger.

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

## Attribute Performance



## Security Check

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

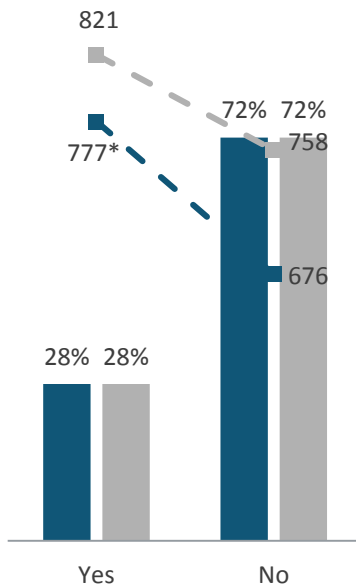
Less than half of LGA passengers are experiencing a speedy security check.

Only 28% of LGA passengers report seeing signs with security wait times.

### Signage to Inform Security Wait Time by Security Check Satisfaction

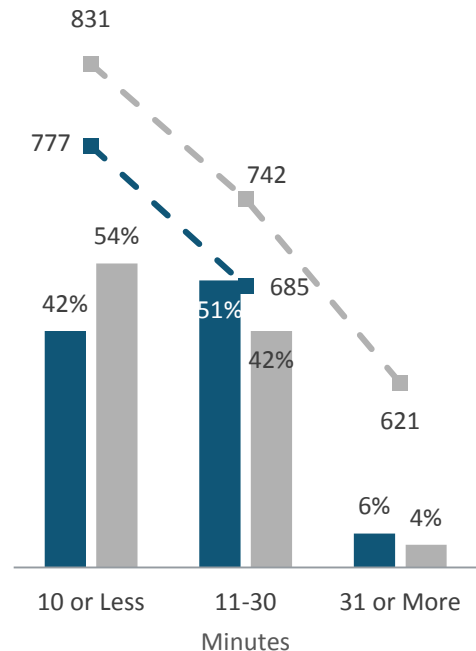
KPI

- LGA
- Large Average
- LGA Security Check Index
- Large Average Security Check Index



### Time to Get Through Security

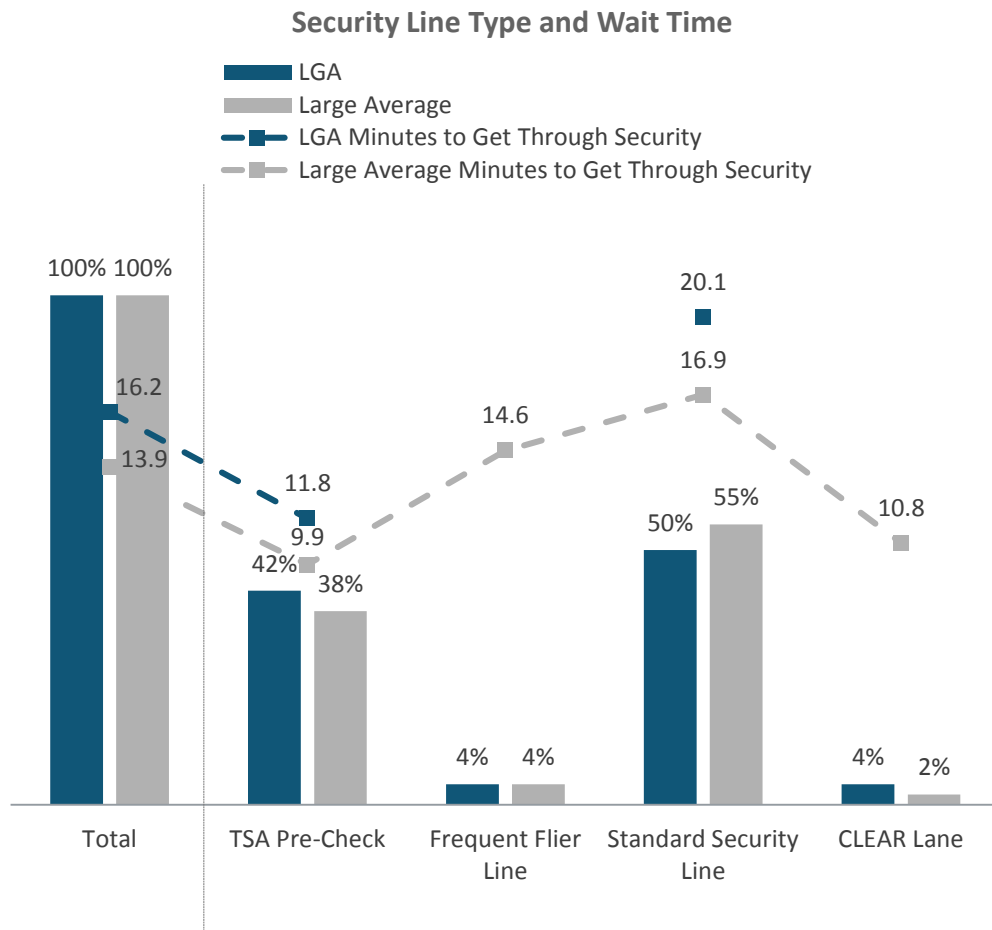
- LGA
- Large Average
- LGA Security Check Index
- Large Average Security Check Index



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

## Security Check

Security times at LGA are over two minutes slower than wait times at the average Large airport



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



## Food/Beverage & Retail Services



## Food/Beverage & Retail Services Satisfaction

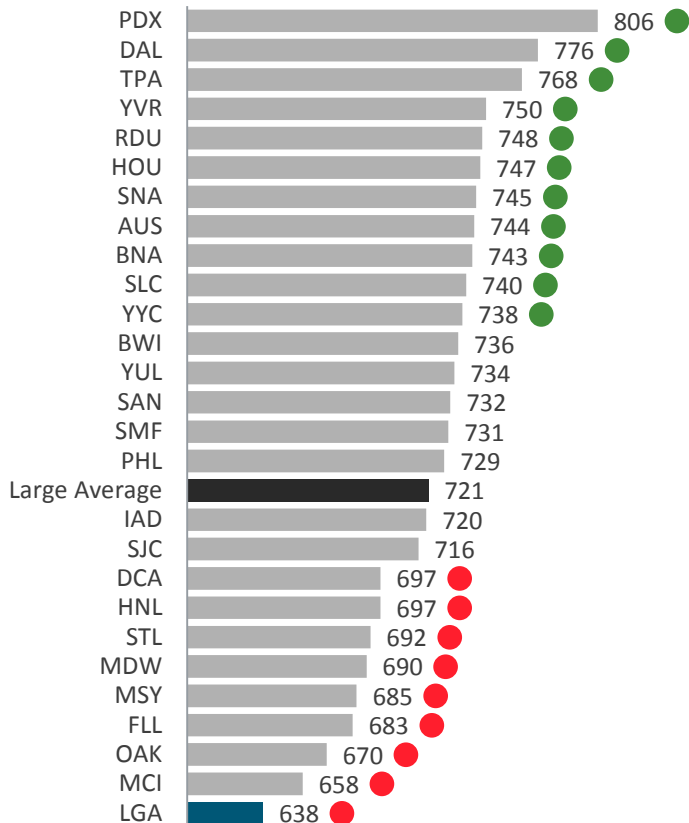
LGA ranks 27<sup>th</sup> in Food/Beverage and Retail Services, scoring 20 points below 26<sup>th</sup> ranked MCI

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

- “Coffee”
- “I always find a great variety of healthy snack/granola bars - I look forward to those. The lines are really long though to pay and it's sometimes confusing figuring out where to pay.”
- “In the mornings, the croissants at Empire Tavern and Bar Brace are fabulous. ”
- “Duty free alcohol because even with the exchange, it is still way cheaper there then in Canada”

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

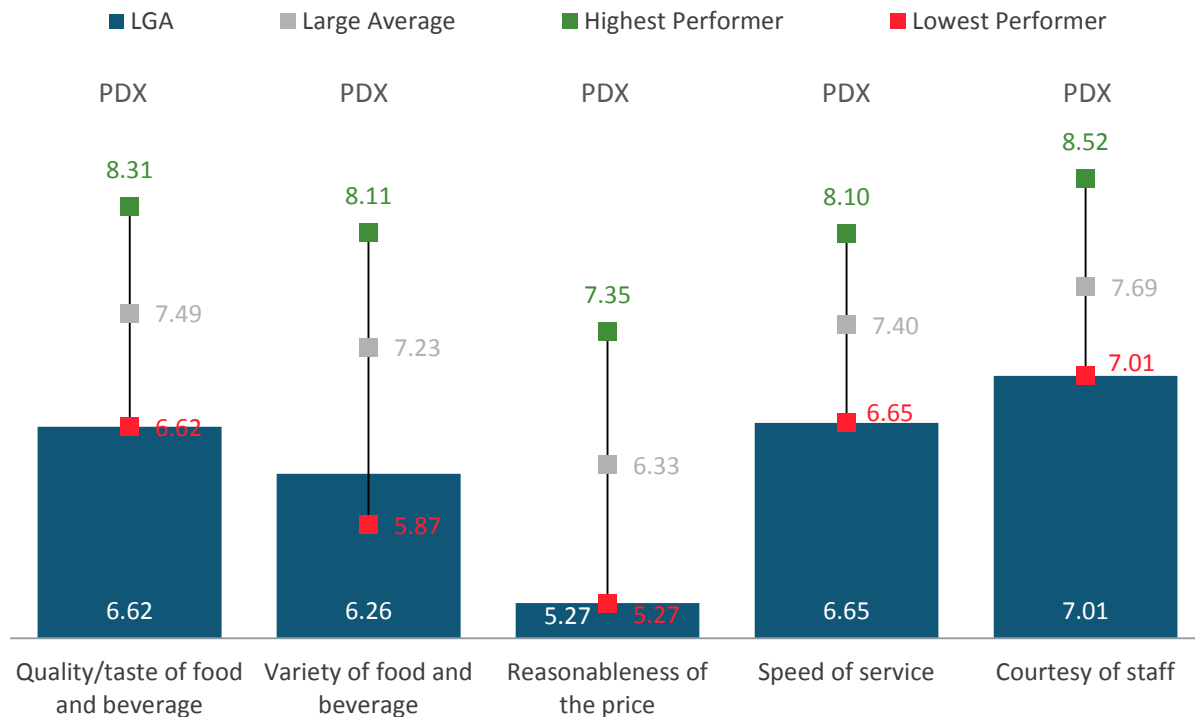
## Food/Beverage and Retail Services: Large Airports



## Food/Beverage & Retail Services

LGA scores higher than  
MCI in *Variety of food  
and beverage*

### Attribute Performance – Food/Beverage

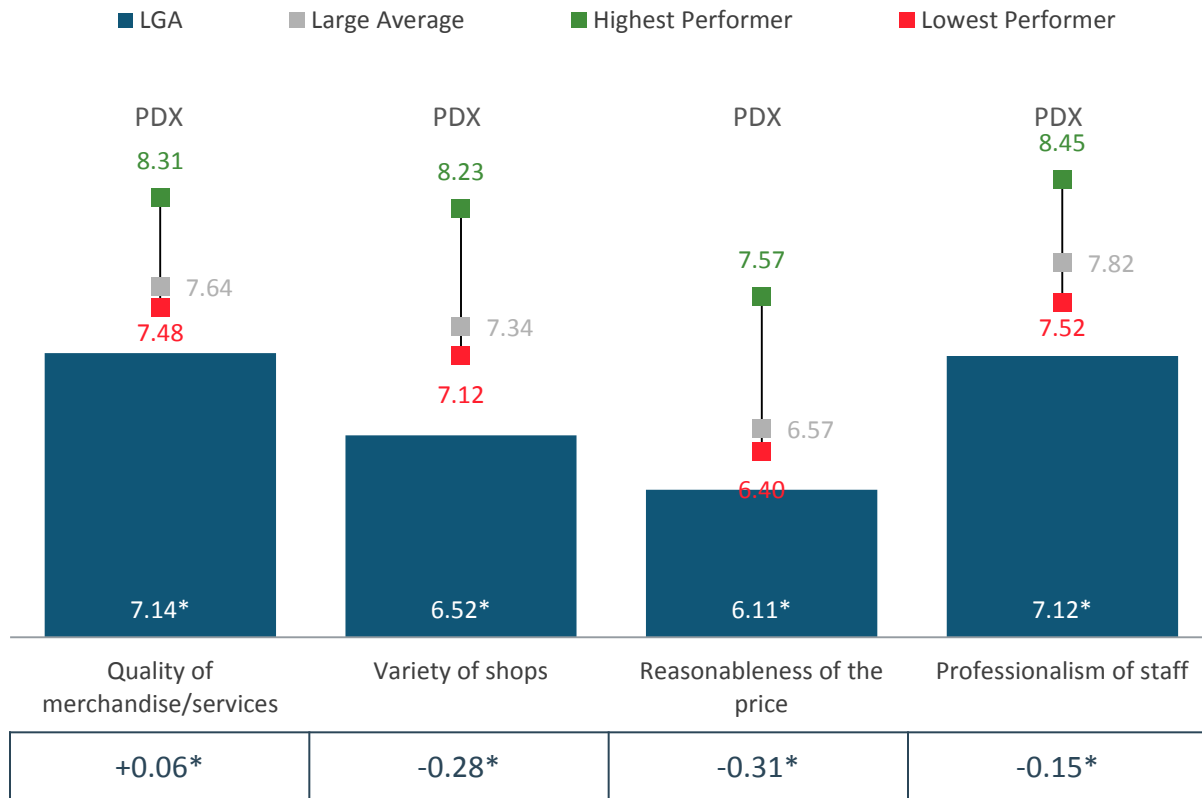


\*Small sample size (n=30-99); #Insufficient sample size (n<30).

## Food/Beverage & Retail Services

23% of LGA passengers purchase merchandise/services, on par with other Large airports

## Attribute Performance – Retail Services



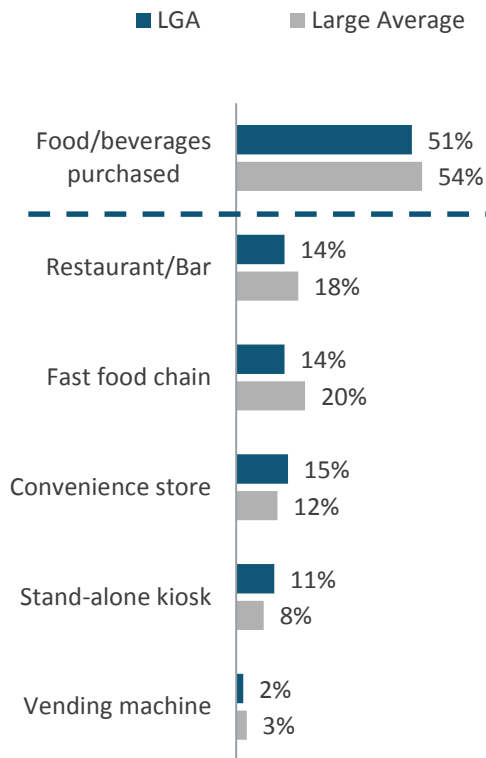
\*Small sample size (n=30-99); #Insufficient sample size (n<30).

## Food/Beverage & Retail Services

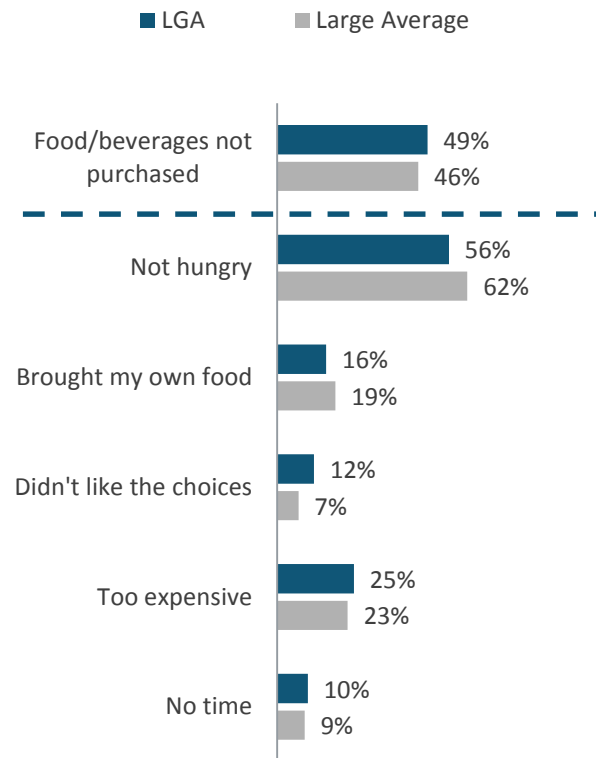
51% of LGA passengers purchase food or beverages

Most purchases made are at convenience stores, restaurants/bars or fast food chains.

### Purchase Food and/or Beverages



### Reason for Not Purchasing

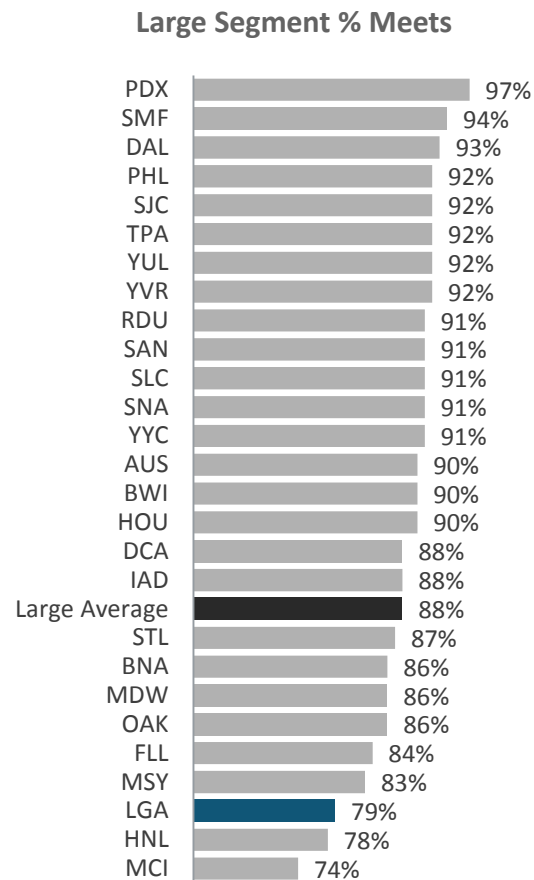
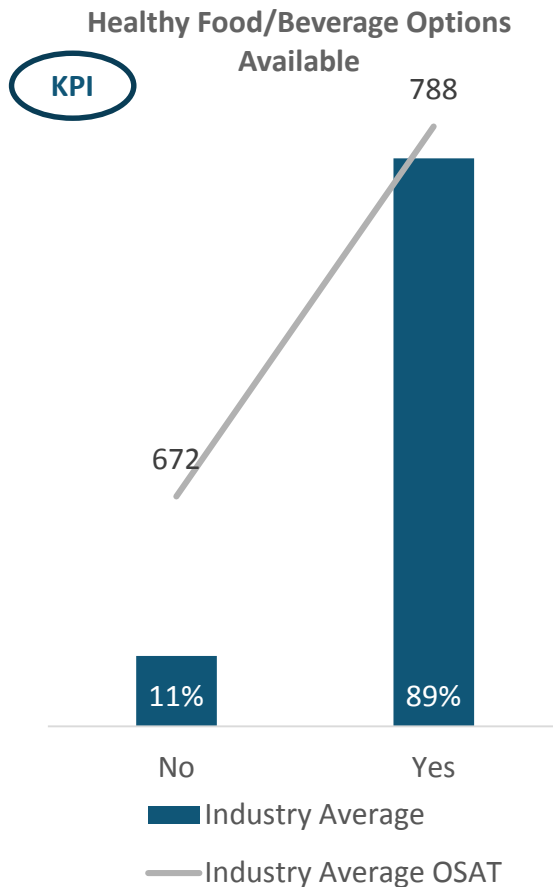


\*Small sample size (n=30-99); #Insufficient sample size (n<30).

## Food/Beverage & Retail Services

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

79% of LGA passengers report health/food options as being available, below the segment average.

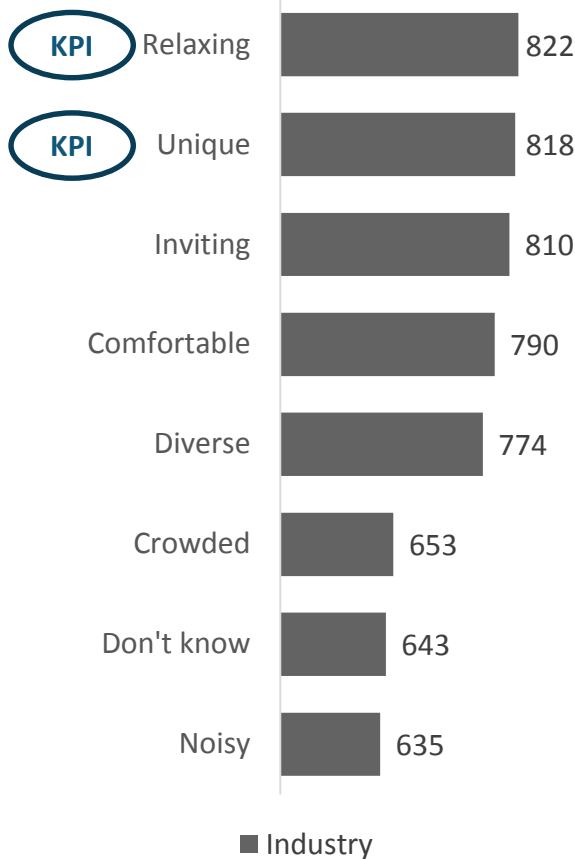


## Food/Beverage & Retail Services

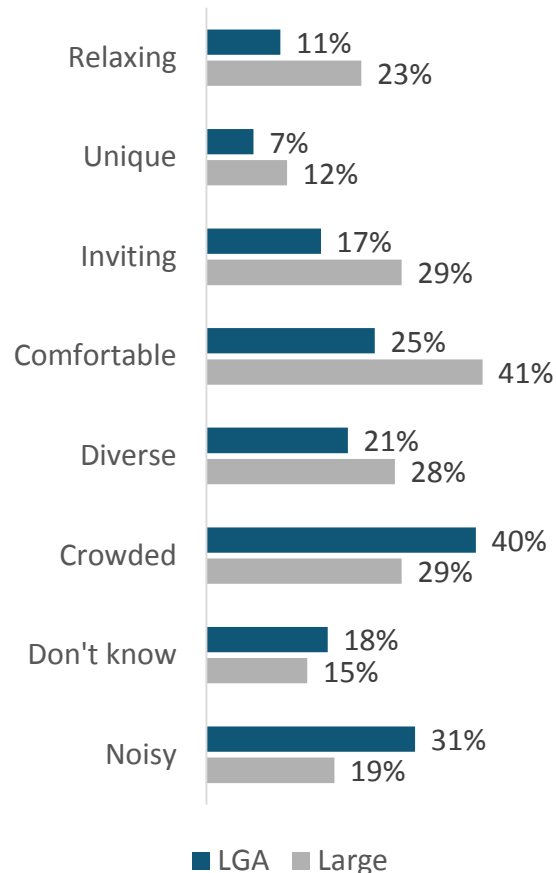
LGA restaurants/bars are described most often as *crowded* and *noisy*

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...



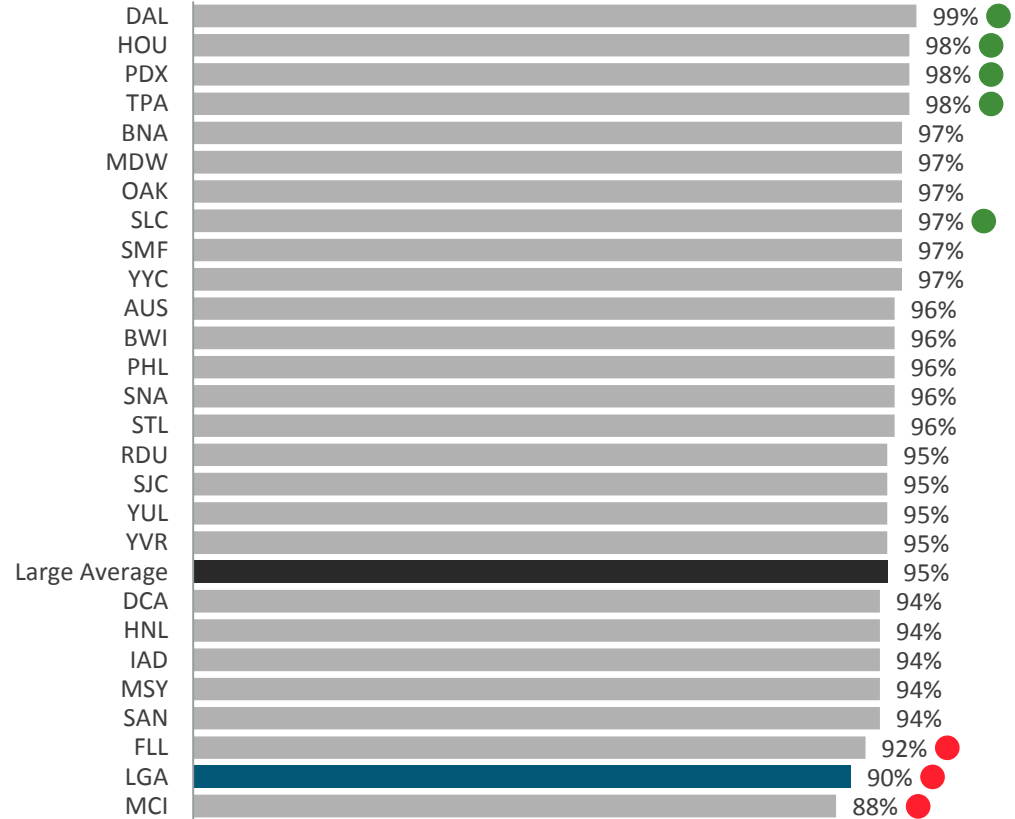
### Restaurants/Bars in Terminal Seem...



## Food/Beverage & Retail Services

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

## Availability of Food & Beverage with Local Flavor: Large Airports



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



## Terminal Facilities



## Terminal Facilities Satisfaction

# LGA ranks 27<sup>th</sup> in Terminal Facilities

*“Clean it. Provide more comfortable seating and repair when broken.”*

*“Clearer instructions (like a work flow) to guide people to where they go next. Lot of confused people sometimes”*

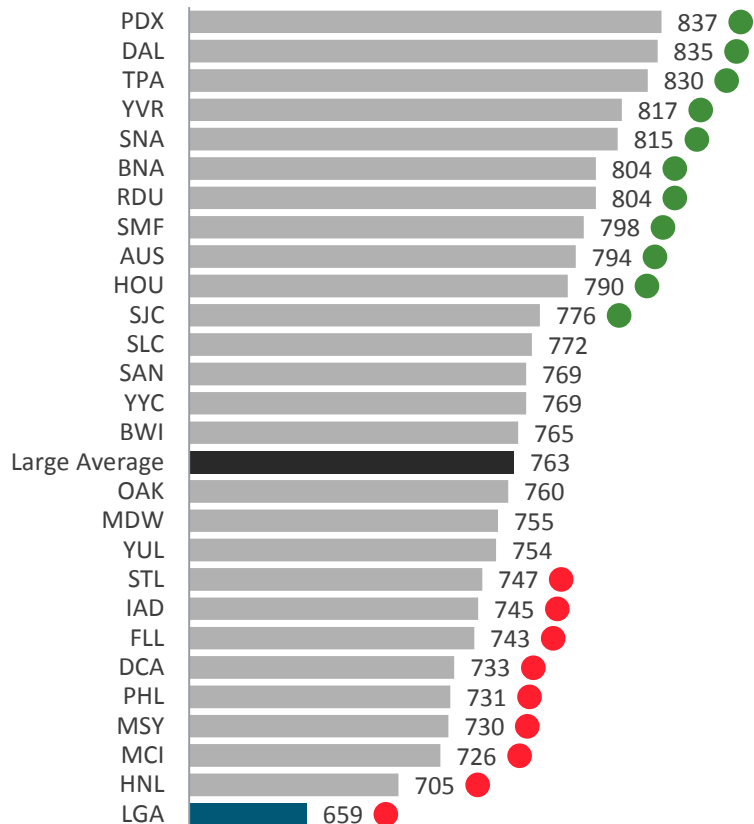
*“Have more seats at the gate. A lot of the charging stations did not work.”*

*“Clarity in audio announcements on flight info. Speak slowly and avoid other announcements being made.”*

*“We had to sit in the floor. No seats fir us.”*

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

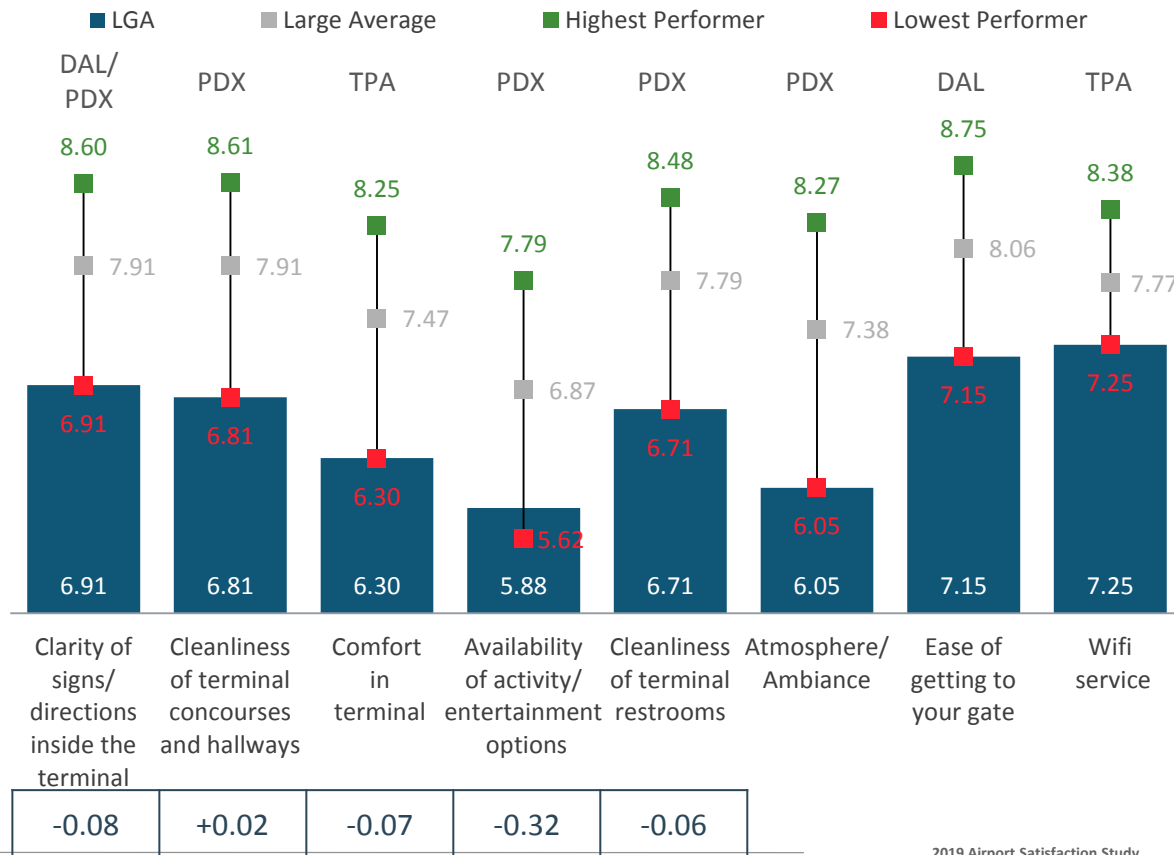
## Terminal Facilities Index: Large Airports



## Terminal Facilities

LGA is the lowest performer in all Terminal Facilities attributes except Availability of activity/entertainment options

## Attribute Performance



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

## Terminal Facilities

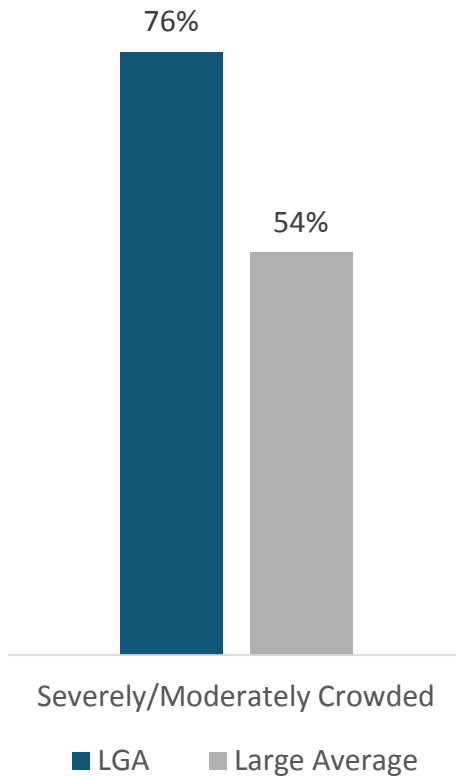
Terminal Facilities satisfaction declines when terminals are perceived as crowded

LAX (81%) and LGA (76%) have the highest perceptions of terminal crowd.

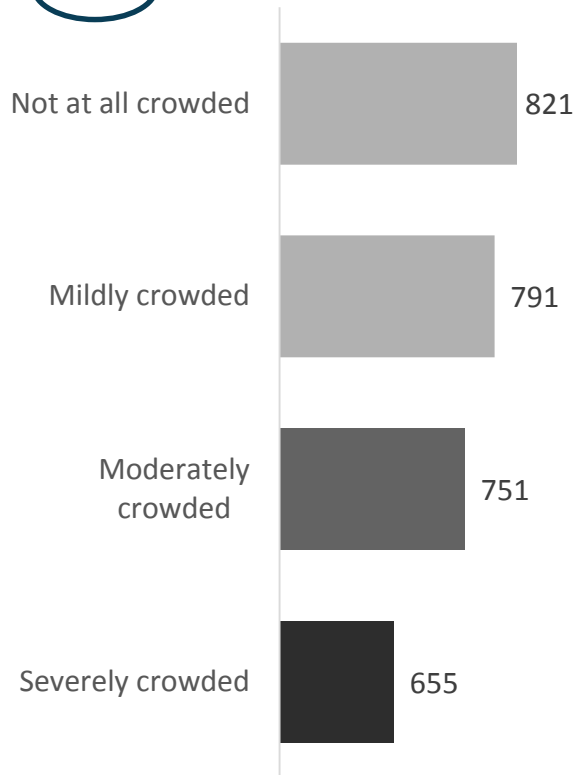
4% of LGA passengers feel the terminal was not at all crowded.

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

## Crowd Within the Airport Terminal



## Terminal Facilities Index by Crowding – Total Industry

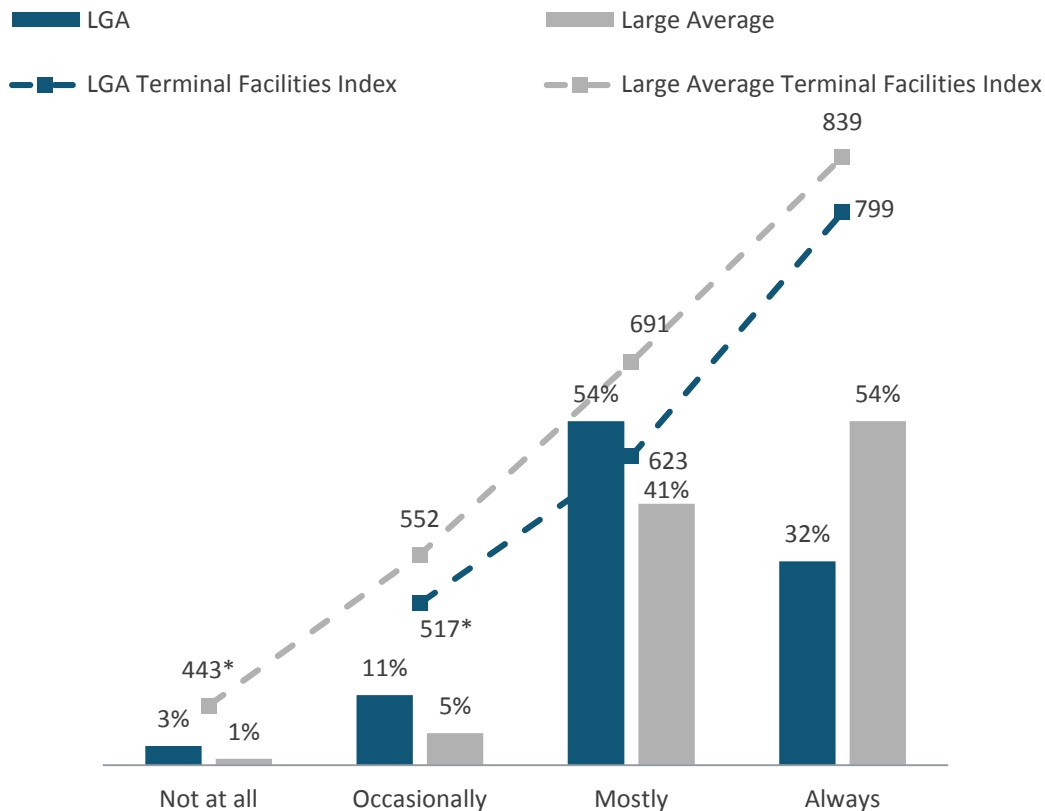


## Terminal Facilities

# Easy to understand signage boosts Terminal Facilities Satisfaction

Temporary signage during construction needs to be extraordinarily visible and well-placed. It is difficult to meet the “Always” rating during major construction.

## Signage Easy to Understand

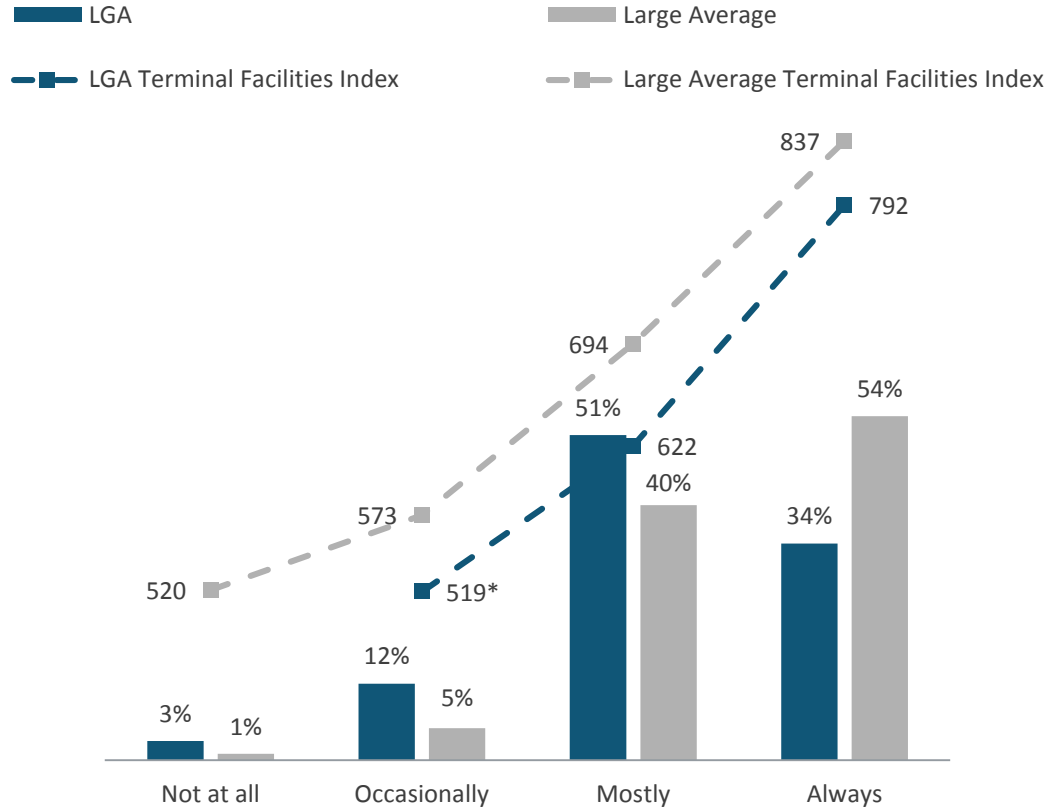


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## Terminal Facilities

# 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

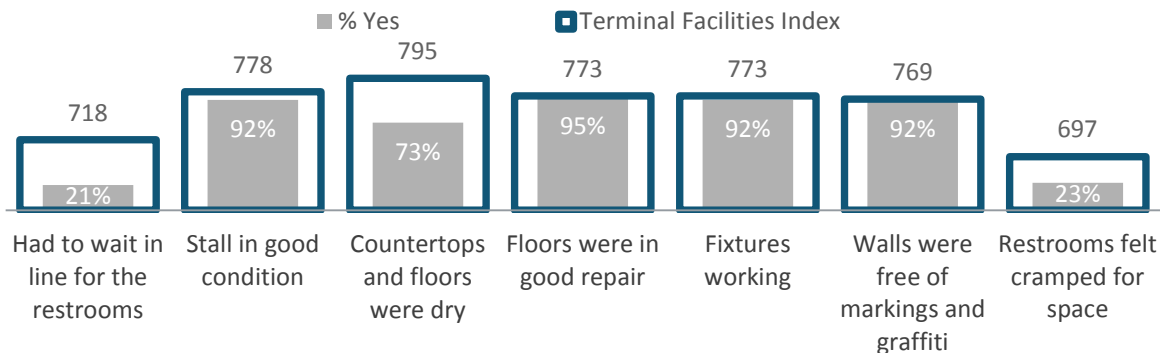
Passenger's perceptions of restroom conditions impacts Terminal Facilities Satisfaction greatly

*"old broken toilet seats in the bathroom"*

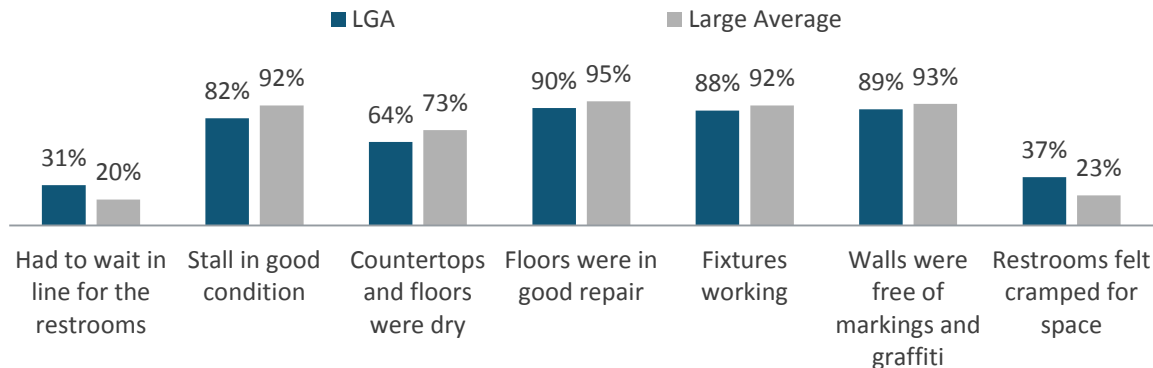
*"even if there is construction the restrooms need to be cleaned"*

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

## Restroom Diagnostics by Terminal Facilities Index – Total Industry



## Restroom Components – % Yes



## Terminal Facilities

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

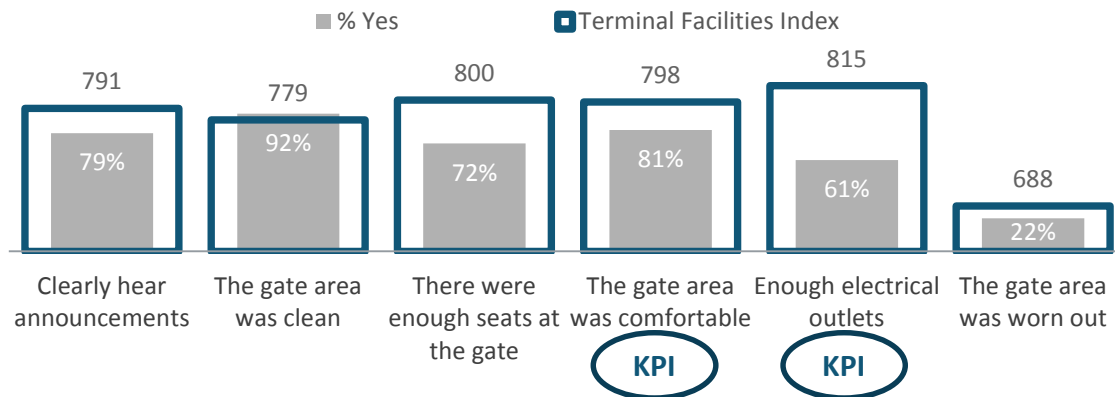
*“Half the electrical outlets in the seats didn't work. Fixing those would be an improvement”*

*“The announcements were very loud and they were over each other so it was hard to understand clearly each announcement.”*

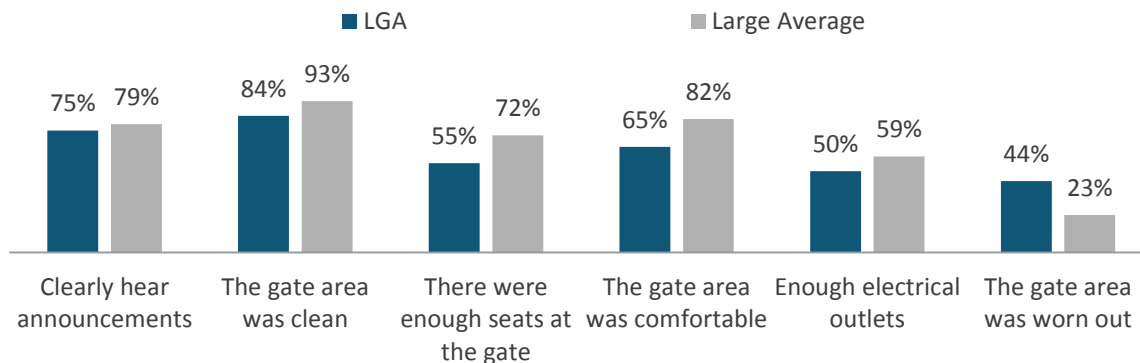
*“More seating is definitely needed! Cleaner floors. Better lighting!”*

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

## Gate Area Diagnostics by Terminal Facilities Index – Total Industry



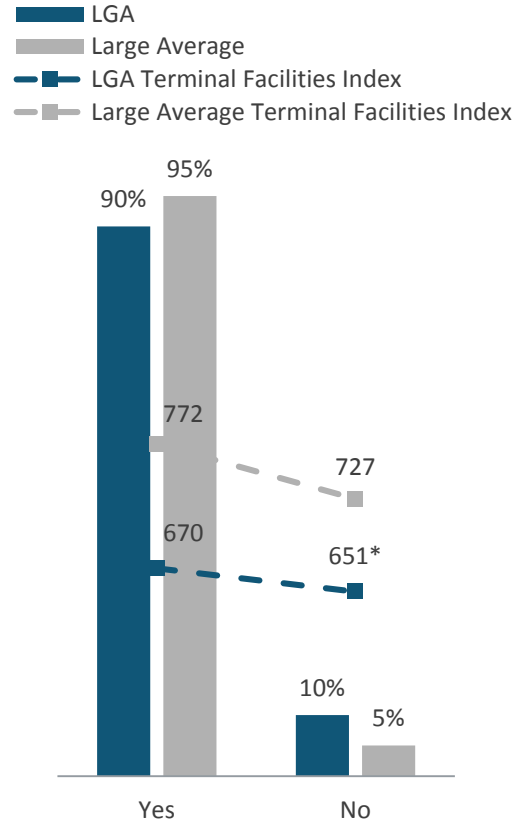
## Gate Area Diagnostic Performance



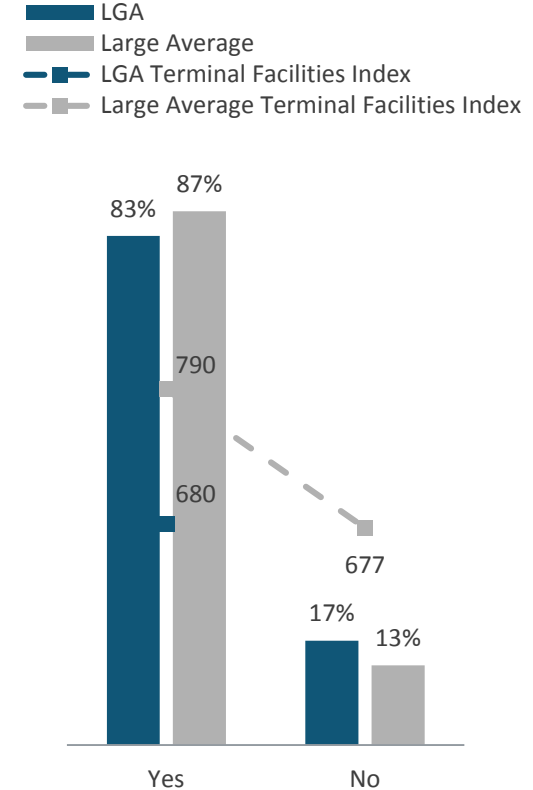
## Terminal Facilities

Satisfaction amongst Large airports is 113 points higher when Wi-Fi is faster or as fast as expected

### Wi-Fi Connection Offered



### Wi-Fi Connection Faster Than or As Expected

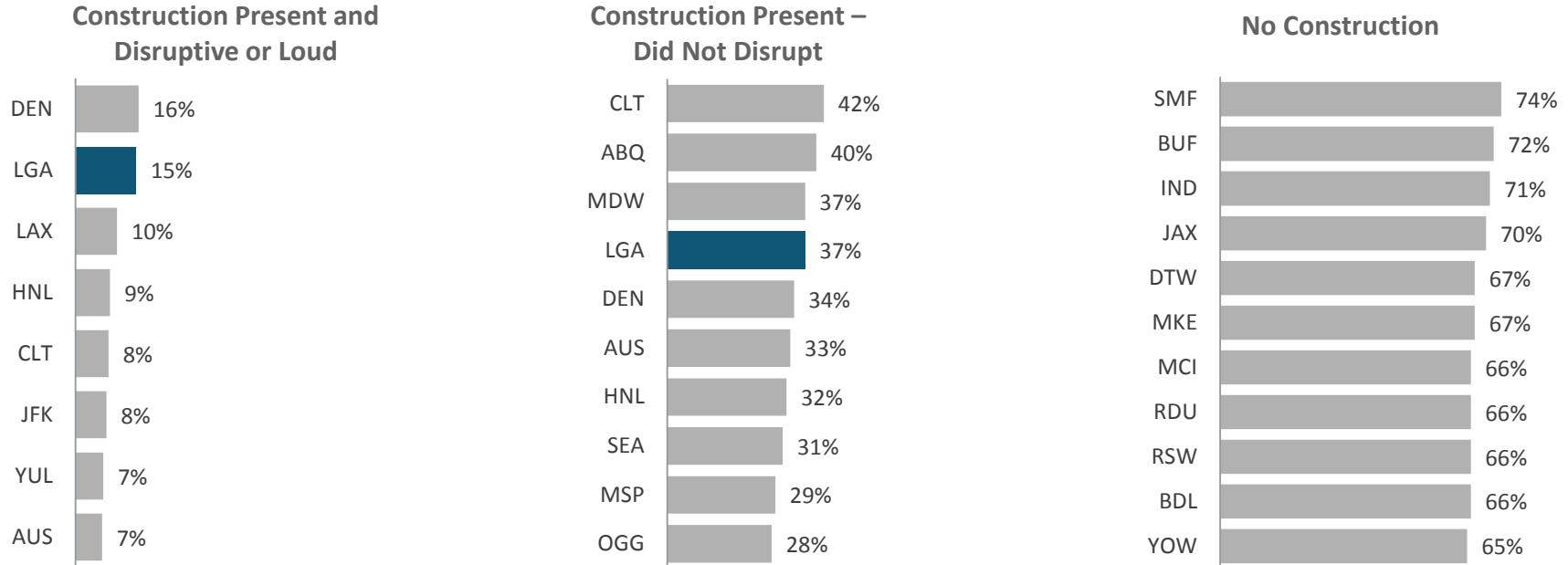


\*Small sample size (n=30-99); #Insufficient sample size (n<30); Not all data shown due to insufficient sample (n<30).



## 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.



DEN is renovating their main entrance hallway and relocating the main TSA area.



## Baggage Claim

## Baggage Claim Satisfaction

LGA ranks 27<sup>th</sup> in Baggage Claim, scoring 11 points behind 26<sup>th</sup> ranked MSY

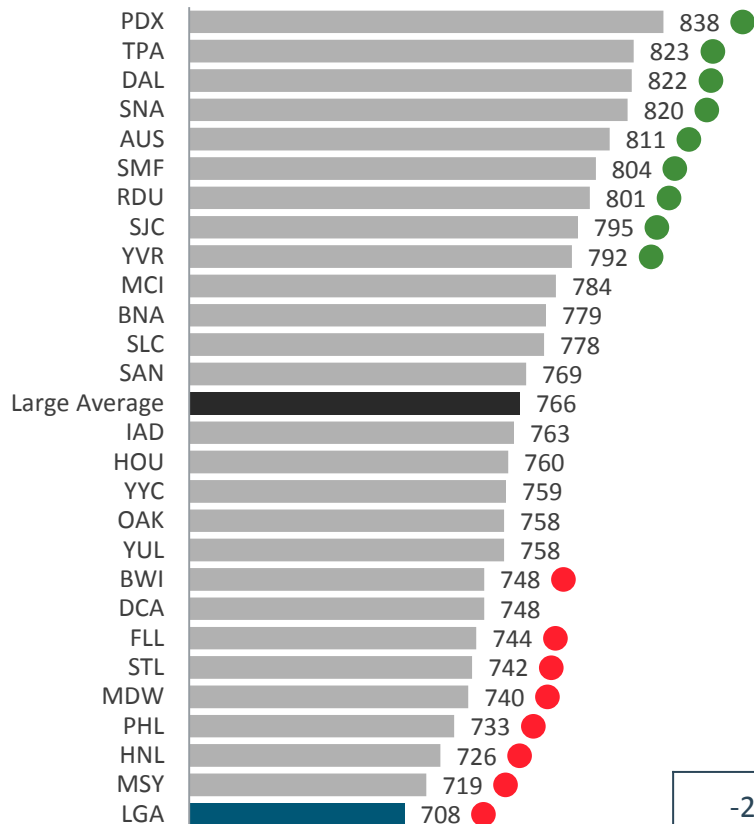
*"Baggage claim area was disappointing and outdated compared to new terminal. Restrooms were very nice in renovation areas"*

*"Baggage was on the belt really fast, but terminals were hard to figure out, lots of construction"*

*"People arriving have to wade through a tremendous amount of people to get to the exits or baggage carousels. Hard for wheel chairs/strollers to get through."*

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

## Baggage Claim Index: Large Airports

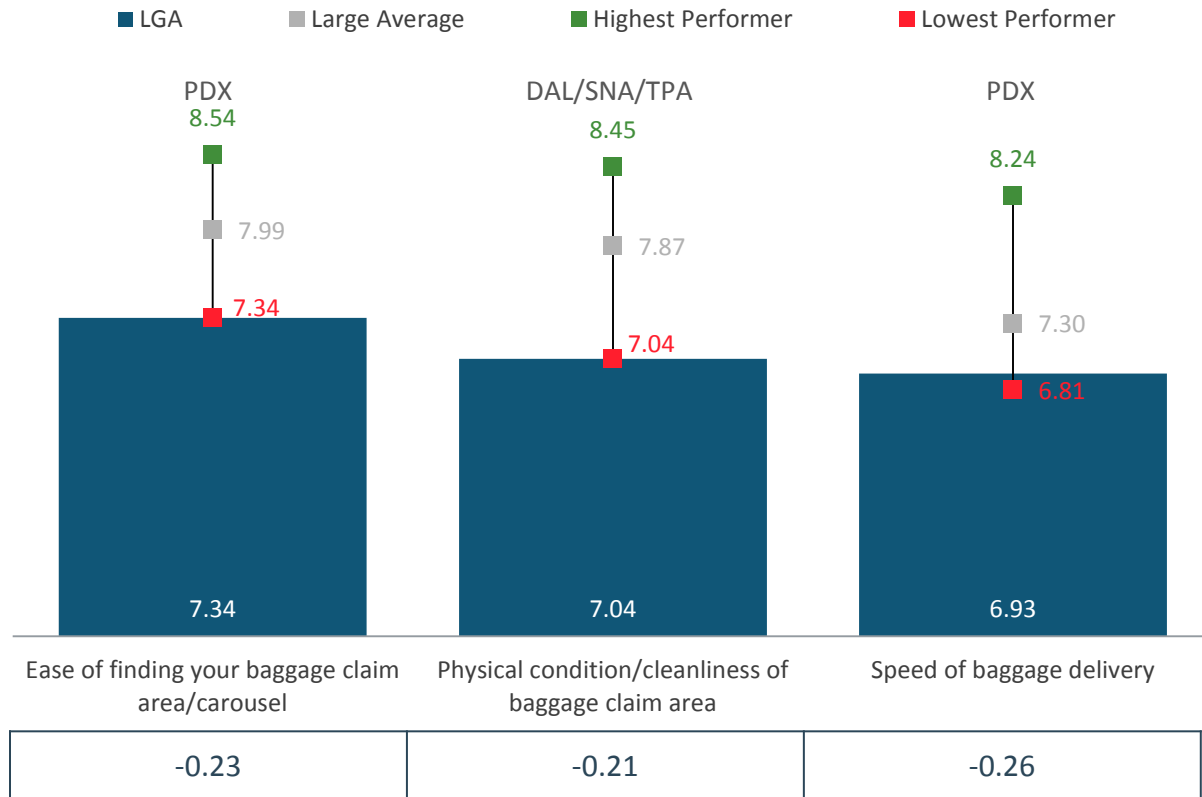


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## Baggage Claim

LGA is the lowest performer in *Ease of finding and Physical condition/cleanliness of baggage claim area*

## Attribute Performance



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

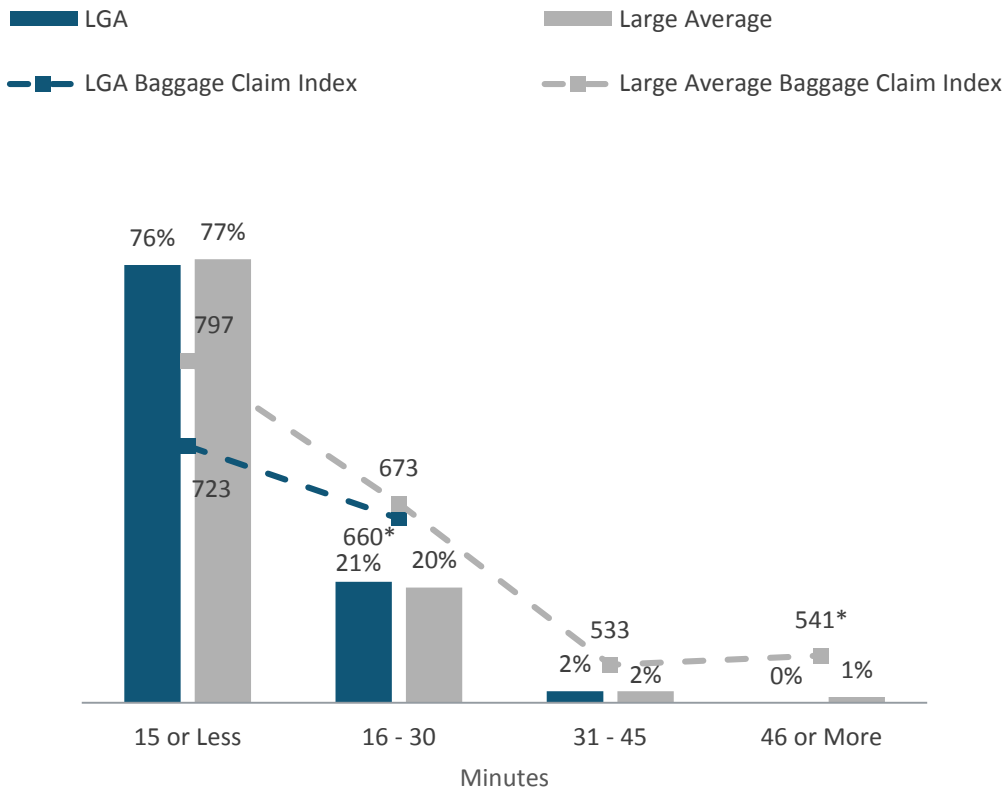
## Baggage Claim

LGA passengers are waiting for their bags one minute less than the average Large airport passenger

LGA passengers wait an average of 12 minutes to get their bags compared to 13 minutes at the average Large airport.

It takes LGA passengers an average of 12 minutes to get to the baggage area compared to 11 minutes for the average Large airport passenger.

## Wait Time for Baggage and Baggage Claim Satisfaction



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



## Near Term Actions

## Action Items

*What can LGA do in the near-term to increase satisfaction*

Review temporary signage for completeness and optimum sign locations

---

Eliminate/reduce light and sound pollution to create “calm” zones at LGA

---

Reduce constriction of terminal walkways. Are there “better” locations for kiosks then in passenger pathways?

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Investigate whether seats and other leasehold improvements can be moved from unused gates to currently used gates?  
Replace/repair broken seating and other hardware

---

Examine TNC areas, path and walkways for consistency and appearance. Does signage reassure passenger they are going in the correct direction and have reached correct destination?

# Beyond Measure

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