



Airport Performance Report

First Quarter 2019

Summary Results for Aviation Management

April 19, 2019

A Customer Experience Presentation

2019 ACI-ASQ Study Objectives

- ➔ Provide a Customer Satisfaction Evaluation of the airport environment and the services and amenities provided while customers are at the airport.
- ➔ Provide a trended Benchmark Comparison for PA Airports to gauge our performance relative to: 1) customer experience improvement initiatives; and 2) the airport industry and our Peer Airports.
- ➔ 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 provide guidance for marketing, planning, investment and customer experience improvement initiatives.

Methodology at a Glance

- **ACI's Airport Service Quality (ASQ) is a monthly benchmarking program aggregated to a quarterly report.**
- **Nearly 350 airports worldwide participated 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. In Q3 2018, the Port Authority more than doubled the sample size for its three airports to over 5,000 completed surveys, in order to provide a more robust database for detailed analysis.

Participating Airports Q1 2019

➔ In Q1 2019, 349 airports have participated in the ACI ASQ Survey.

➔ 169,809 passengers have completed the ASQ Survey, including 3,073 at JFK, 991 at EWR, and 1,006 at LGA.

	< 2 M	2 - 5 M	5 - 15 M	15 - 25 M	25 - 40 M	> 40 M	TOTAL
AFRICA	13	7	6	1			27
	BFN, BZV, DLA, EBB, ELS, GRJ, KIM, LFW, MBA, NSI, PLZ, PNR, UTN	ABJ, ABV, ACC, DSS, LOS, MRU, RAK	ADD, CMN, CPT, DUR, NBO, TUN	JNB			
ASIA PACIFIC	12	34	29	13	7	20	115
	BTJ, BWX, DJB, DTB, IXZ, NTL, PGK, PPT, RPR, TNJ, TRZ, TSV	AMQ, ATQ, BBI, BDO, CCJ, CEI, CJB, DRW, HBA, HDY, IDR, IXB, IXC, IXE, IXR, KOE, LGK, LOP, MDC, MLE, PAT, PDG, PKU, PLM, PNK, REP, SOC, SRG, SXR, TRV, UKB, VNS, VTZ, YIH	ADL, AMD, BPN, CGQ, CHC, CNS, CNX, COK, FOC, GAU, GOI, HET, HLP, INC, ITM, JAI, KHN, KNO, LKO, MFM, OOL, PER, PNH, PNQ, RGN, SJW, UPG, WLG, XNN	AKL, CCU, DPS, HAK, HKT, HRB, HYD, MAA, SHE, SUB, SYX, TSN, WUH	BLR, DMK, GMP, HGH, KIX, MEL, NKG	BKK, BOM, CAN, CGK, CKG, CTU, DEL, HKG, ICN, KMG, KUL, NRT, PEK, PVG, SHA, SIN, SYD, SZX, TPE, XIY	
EUROPE	22	18	38	13	11	9	111
	AES, BOO, DSA, EAS, GRX, INV, KRS, LCG, LEI, MLN, OVD, PDL, PNA, REU, RMU, SDR, SPC, VDE, VGO, VLL, XRY, ZAZ	ABZ, BMA, FNC, GRO, LCY, MAH, PFO, SCQ, SKP, SOU, SVG, TBS, TLL, TOS, TRD, TRN, VNO, ZAG	ACE, ADB, AER, ALC, BGO, BHX, BIO, BLQ, BRS, BSL, BUD, CIA, EDI, FAO, FUE, GLA, GOT, IBZ, KEF, KRK, LCA, LIN, LPA, LYS, MLA, MRS, NAP, NCE, NCL, OPO, OTP, RIX, SVQ, SXF, TFN, TFS, TLS, VLC	AGP, ATH, DUS, ESB, GVA, HAM, HEL, LED, LTN, MXP, PRG, TXL, WAW	ARN, BRU, CPH, DME, DUB, LIS, ORY, OSL, PMI, VIE, ZRH	AMS, BCN, CDG, FCO, LGW, LHR, MAD, MUC, SVO	
LATIN AMERICA / CARIBBEAN	11	10	10	2	2		35
	BDA, BRC, CUR, EPA, GPS, KIN, LIR, POP, RTB, SAP, SLA	AUA, BGI, COR, GYE, MDZ, MVD, NAS, POS, PVR, SDQ	AEP, CNF, EZE, GDL, PTY, PUJ, SJD, SJO, TIJ, UIO	GIG, SCL	BOG, CUN		
MIDDLE EAST	1		4	3	1	1	10
	SLL		AMM, BAH, DMM, MED	AUH, MCT, TLV	RUH	DXB	
NORTH AMERICA	8	8	14	6	6	9	51
	AVL, LAN, YMM, YQB, YQM, YQR, YXE, YYT	ELP, GRR, PWM, YHZ, YLW, YTZ, YWG, YYJ	CLE, CMH, CVG, IND, JAX, MKE, MSY, ONT, PIT, SAT, SJC, STL, YEG, YOW	AUS, DAL, SAN, SLC, TPA, YUL	BWI, DTW, FLL, LGA, MSP, PHL	ATL, BOS, DFW, EWR, JFK, LAX, SEA, SFO, YYZ	
TOTAL	67	77	101	38	27	39	349

Customized Peer Airport Panels

- The following airports form the Port Authority's Peer Airport Panel. Airports are selected primarily based on passenger traffic, passenger composition and airport location/infrastructure.

JFK PEER AIRPORTS

IATA

CODE AIRPORT NAME

AMS	AMSTERDAM AIRPORT SCHIPHOL
ICN	INCHEON INT'L AIRPORT
JFK	JOHN F. KENNEDY INT'L AIRPORT
LAX	LOS ANGELES INT'L AIRPORT
LHR	LONDON HEATHROW AIRPORT
PVG	SHANGHAI PUDONG INT'L AIRPORT
SIN	SINGAPORE CHANGI AIRPORT

EWR PEER AIRPORTS

IATA

CODE AIRPORT NAME

BOS	LOGAN INT'L AIRPORT
EWR	NEWARK LIBERTY INT'L AIRPORT
MSP	MINNEAPOLIS–SAINT PAUL INT'L AIRPORT
MUC	MUNICH AIRPORT
SEA	SEATTLE–TACOMA INT'L AIRPORT
YYZ	TORONTO PEARSON INT'L AIRPORT

LGA PEER AIRPORTS

IATA

CODE AIRPORT NAME

BOS	LOGAN INT'L AIRPORT
BWI	BALTIMORE–WASHINGTON INT'L AIRPORT
FLL	FORT LAUDERDALE–HOLLYWOOD INT'L AIRPORT
LGA	LAGUARDIA AIRPORT
MSP	MINNEAPOLIS–SAINT PAUL INT'L AIRPORT
PHL	PHILADELPHIA INT'L AIRPORT

“Who the Customer Is”

Q1 2019 Profile Comparison: PA Airport to Peer Airport Panel

	JFK Panel		EWR Panel		LGA Panel	
Business	17%	23%	28%	32%	37%	30%
International	55%	64%	32%	28%	8%	14%
Connecting	29%	29%	24%	29%	14%	24%
Local O-D Pax. Dwell Time (mins.)	105.6	103.4	102.1	102.8	92.4	99.2
Women	53%	52%	51%	52%	54%	57%
Average Age	41	40	44	45	42	46
First/Business Class	10%	8%	12%	12%	16%	13%
Economy/Tourist Class	90%	92%	88%	88%	84%	87%
Check-in at Kiosk	19%	24%	30%	28%	24%	28%
Check-in Internet/Phone	32%	29%	37%	41%	49%	39%
Check-in at Main Desk	33%	31%	19%	20%	16%	18%
Check-in Curbside	3%	4%	4%	3%	1%	4%
Bag Drop Only	15%	17%	16%	15%	13%	15%
Avg. # of Return Trips (P12 Mos.)	5.1	5.7	6.1	6.2	7.2	6.1
Top Modes of Access: *						
Personal Car	33%	29%	42%	38%	29%	40%
Rental Car	4%	7%	6%	7%	3%	9%
Taxi/Limo	32%	23%	21%	17%	46%	21%
Rail/Subway	12%	15%	9%	9%	1%	2%
Bus/Shuttle	9%	15%	9%	14%	8%	13%
Other (Uber/Lyft, etc.)	11%	11%	13%	14%	13%	15%

* Among O-D Passengers; Statistically higher.

- The demographic and airport passenger usage profiles of JFK, EWR and LGA in Q1 exhibit some significant differences versus their respective peer airport panels.
- JFK and EWR have a smaller segment of business travelers than their respective peer airports, while EWR and LGA have a smaller share of connecting traffic. EWR has a larger proportion of international traffic, while JFK and LGA have less. JFK passengers spend more time, on average, on-airport than its peer airport passengers. JFK passengers are a bit older, while LGA passengers are younger. JFK and LGA passengers are more apt to buy upper class air tickets than their respective peer airport passengers.
- Check-in via Internet/phone is more popular at JFK and LGA, while less so at EWR. Self-serve kiosk use is lower at JFK and LGA, while main counter check-in is higher at JFK. Bag Drop is less pronounced at JFK and LGA than at their peer airports..
- Compared to its respective peer airports, JFK airport access leads on taxi/limo usage, but trails on all other access modes. EWR and LGA lead on personal/co. cars and taxi/limo usage. EWR trails on bus/shuttle usage, while LGA trails on rental cars, rail/subway and bus/shuttle usage.

The Satisfaction Rating Attributes

Overall Satisfaction	Total	Airport Facilities	Courtesy and helpfulness of airport staff
	Business ⁽¹⁾		Restaurant/Eating facilities
	Leisure ⁽¹⁾		Value for money of restaurant/eating facilities
	Other ⁽¹⁾		Availability of bank/ATM facilities/money changers
Access	Ground transportation to/from airport		Shopping facilities
	Parking facilities		Value for money of shopping facilities
	Value for money of parking facilities		Internet access/Wi-Fi
	Availability of baggage carts/trolleys		Business/Executive lounges
Check-in	Waiting time in check-in queue/line		Availability of washrooms/toilets
	Efficiency of check-in staff		Cleanliness of washrooms/toilets
	Courtesy and helpfulness of check-in staff		Comfort of waiting/gate areas
Security ID Check	Waiting time at passport/personal ID inspection	Airport Environment	Cleanliness of airport terminal
	Courtesy and helpfulness of inspection staff		Ambience of the airport
Security	Courtesy and helpfulness of security staff	Airport Arrivals	Passport/ID inspection
	Thoroughness of security inspection		Speed of baggage delivery
	Waiting time at security inspection		Customs inspection
	Feeling of being safe and secure		
Finding Your Way	Ease of finding your way through airport	Notes: ⁽¹⁾ Q7 "Overall Satisfaction" is filtered by Q4 "Main Reason for this air trip". Responding to all questions is not mandatory, the number of respondents could be different for each item and it could be lower than the total number of completed questionnaires.	
	Flight information screens		
	Walking distance inside the terminal		
	Ease of making connections with other flights		

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

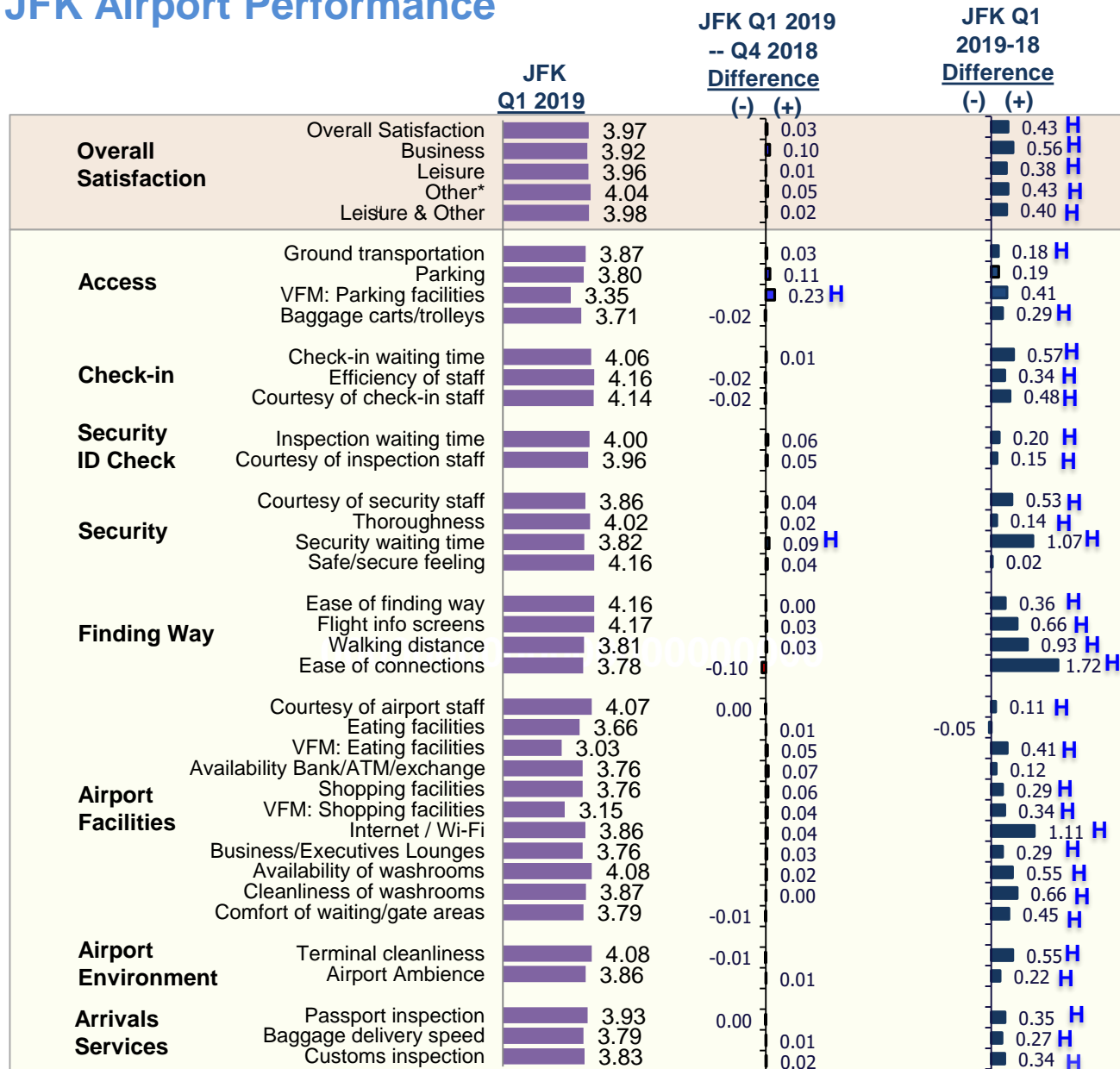


Airport-level Satisfaction Performance



JFK Satisfaction Performance

JFK Airport Performance



- JFK passenger satisfaction increased significantly overall in Q1 2019 (3.97) vs. year-over-year (YOY, Q1 2018) and for all passenger segments and on nearly all airport elements, except parking facilities (3.80) and their perceived value for the money (VFM)--3.35, and safe/secure feeling from the security check experience (4.16). There was especially strong improvement in the TSA wait time at the magnetometer (3.82), ease of connections (3.78) and Internet/Wi-Fi availability (3.86).
- Passenger satisfaction improved slightly overall vs. last quarter (Q4 2018) as did most of the airport elements. There was significant improvement though in parking facilities VFM (3.35) and TSA wait time at the magnetometer (3.82).
- The highest scoring airport element in Q1 2019 is the FIDS (4.17); the lowest was eating facilities VFM (3.03).

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.

H/L: Q1 2019 (N=3,073) significantly Higher/Lower than Q4 2018 or Q1 2018.

JFK Airport Performance vs. Peer Panel

			Peer Panel	JFK Rank~	AMS	LAX	LHR	ICN	PVG	SIN
Overall Satisfaction	Overall Satisfaction	3.97 H1	4.18 H	6	4.08 H	3.84 L	4.18 H	5.00 H	5.00 H	5.00 H
	Business	3.92 H1	4.07 H	6	4.06	3.75 L	4.13 H	4.99 H	4.98 H	5.00 H
	Leisure	3.96 H1	4.16 H	6	4.12 H	3.86 L	4.21 H	5.00 H	5.00 H	5.00 H
	Other*	4.04 H1	4.36 H	5	3.97	3.93	4.18 H	5.00 H	5.00 H	5.00 H
	Leisure & Other	3.98 H1	4.22 H	6	4.09 H	3.88 L	4.20 H	5.00 H	5.00 H	5.00 H
Access	Ground transportation	3.87 H1	4.13 H	6	4.08 H	3.61 L	4.11 H	4.91 H	4.95 H	4.99 H
	Parking	3.80	3.95 H	5	3.69	3.35 L	3.89	4.59 H	4.94 H	5.00 H
	VFM: Parking facilities	3.35 H4	3.45	4	2.88 L	2.91 L	2.89 L	4.66 H	4.94 H	4.96 H
	Baggage carts/trolleys	3.71 H1	4.21 H	7	3.97 H	3.72	4.03 H	4.91 H	4.96 H	4.99 H
Check-in	Check-in waiting time	4.06 H1	4.30 H	7	4.10	4.17 H	4.28 H	4.86 H	4.94 H	4.98 H
	Efficiency of staff	4.16 H1	4.37 H	6	4.14	4.23 H	4.34 H	4.92 H	4.96 H	4.98 H
	Courtesy of check-in staff	4.14 H1	4.36 H	7	4.15	4.22 H	4.34 H	4.90 H	4.95 H	5.00 H
Security ID Check	Inspection waiting time	4.00 H1	4.29 H	7	4.02	4.13 H	4.25 H	4.94 H	4.97 H	4.99 H
	Courtesy of inspection staff	3.96 H1	4.29 H	7	4.23 H	4.11 H	4.29 H	4.91 H	4.96 H	5.00 H
Security	Courtesy of security staff	3.86 H1	4.19 H	7	4.10 H	4.01 H	4.16 H	4.89 H	4.95 H	5.00 H
	Thoroughness	4.02 H1	4.29 H	7	4.20 H	4.10 H	4.26 H	4.96 H	4.96 H	5.00 H
	Security waiting time	3.82 H4/1	4.16 H	7	4.06 H	4.03 H	4.07 H	4.93 H	4.93 H	5.00 H
	Safe/secure feeling	4.16	4.37 H	7	4.29 H	4.18	4.35 H	4.98 H	4.96 H	5.00 H
Finding Way	Ease of finding way	4.16 H1	4.27 H	5	4.14	4.00 L	4.21 H	4.91 H	4.96 H	4.98 H
	Flight info screens	4.17 H1	4.33 H	5	4.14	4.12	4.31 H	4.95 H	4.96 H	4.99 H
	Walking distance	3.81 H1	4.04 H	6	3.52 L	3.91 H	3.88 H	4.86 H	4.94 H	4.97 H
	Ease of connections	3.78 H1	3.99 H	6	4.05 H	3.63 L	3.95 H	4.88 H	4.94 H	4.99 H
Airport Facilities	Courtesy of airport staff	4.07 H1	4.31 H	6	4.20 H	4.04	4.31 H	4.96 H	4.97 H	5.00 H
	Eating facilities	3.66	3.97 H	6	3.84 H	3.56 L	3.97 H	4.84 H	4.96 H	4.97 H
	VFM: Eating facilities	3.03 H1	3.47 H	5	2.98	2.94 L	3.42 H	4.74 H	4.92 H	4.97 H
	Availability Bank/ATM/exchange	3.76	4.20 H	6	3.84	3.66 L	4.02 H	4.89 H	4.96 H	4.99 H
	Shopping facilities	3.76 H1	4.07 H	6	3.92 H	3.50 L	4.04 H	4.88 H	4.94 H	4.99 H
	VFM: Shopping facilities	3.15 H1	3.63 H	6	3.16	3.03 L	3.42 H	4.83 H	4.94 H	4.97 H
	Internet / Wi-Fi	3.86 H1	4.06 H	5	3.73 H	3.75 L	3.86	4.92 H	4.94 H	4.97 H
	Business/Executives Lounges	3.76 H1	4.32 H	5	3.57	3.69	4.06 H	4.95 H	4.97 H	4.98 H
	Availability of washrooms	4.08 H1	4.21 H	5	4.02	3.86 L	4.19 H	4.96 H	4.97 H	4.99 H
	Cleanliness of washrooms	3.87 H1	4.12 H	5	3.83	3.80 L	4.13 H	4.96 H	4.96 H	4.98 H
Airport Environment	Comfort of waiting/gate areas	3.79 H1	3.93 H	4	3.49 H	3.61 L	3.77	4.97 H	4.97 H	4.99 H
	Terminal cleanliness	4.08 H1	4.25 H	5	4.06	3.94 L	4.27 H	4.99 H	4.98 H	5.00 H
Arrivals Services	Airport Ambience	3.86 H1	4.08 H	6	3.93	3.73 L	4.05 H	4.98 H	4.97 H	4.99 H
	Passport inspection	3.93 H1	4.15 H	7	4.02	3.98	3.96	4.93 H	4.95 H	4.99 H
	Baggage delivery speed	3.79 H1	4.00 H	5	3.60 H	3.66 L	3.81	4.78 H	4.94 H	4.99 H
	Customs inspection	3.83 H1	4.12 H	5	3.83	3.77	3.98 H	4.95 H	4.95 H	4.99 H

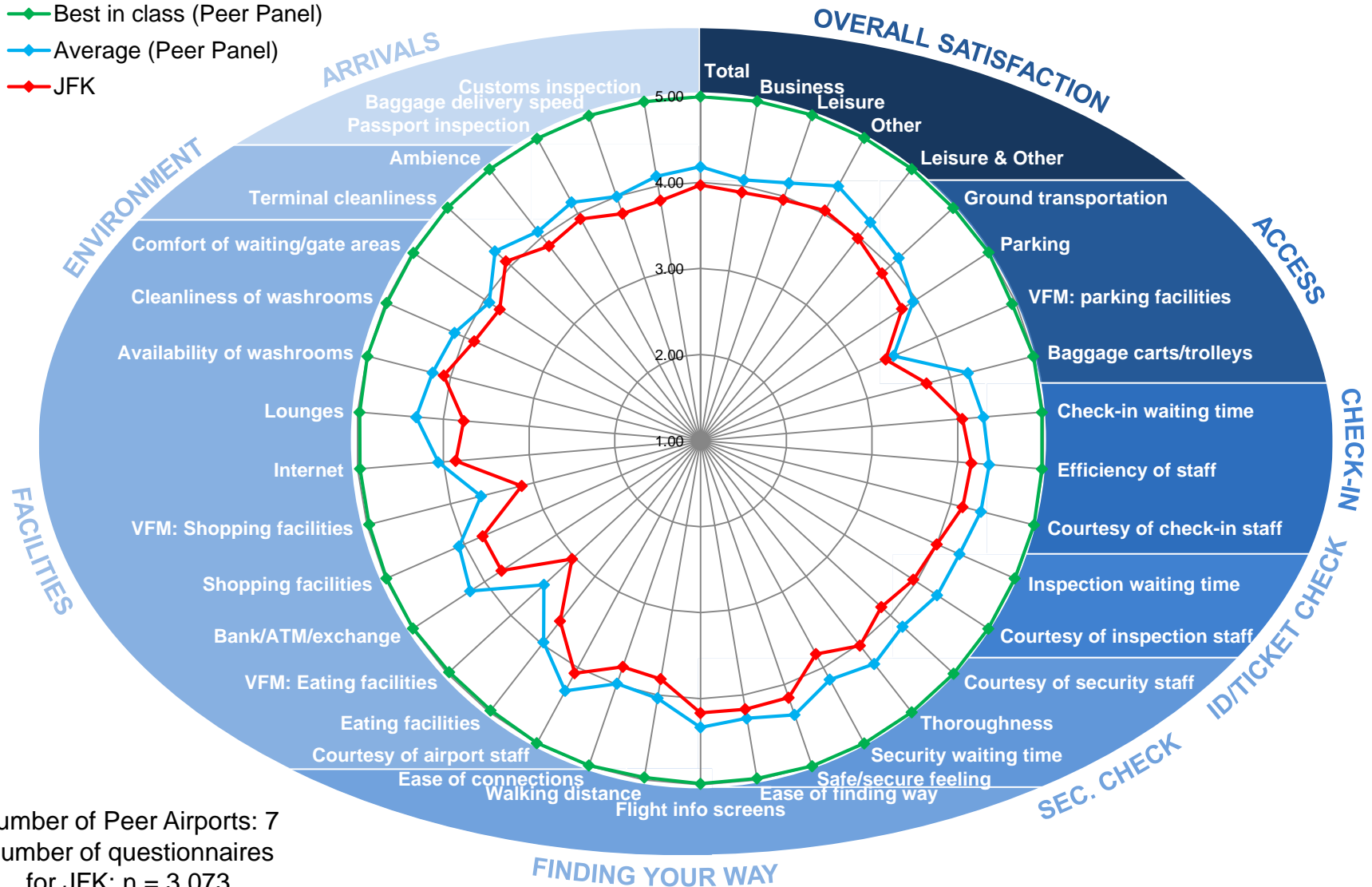
- Despite improvement on many airport elements year-over-year -- YOY (Q1 2018) in pax. satisfaction, JFK still significantly underperforms the peer airports panel overall and on nearly all airport elements, with most items ranking last or next to last, except on parking facilities value for the money, VFM (3.45; ranked 4), where JFK leads AMS (2.88), LAX (2.91) and LHR (2.89). JFK Parking facilities themselves (3.80) outperform LAX (3.35) and is comparable to AMS (3.69) and LHR (3.89).
- JFK outperforms LAX on many other airport elements: nearly all facility elements (except airport staff courtesy-4.04- and business lounges -3.69), terminal cleanliness (3.94) and ambience (3.73), wayfinding (4.00), ground transportation (3.61), ease of connections (3.63) and arrivals bag speed (3.66). JFK performs on a par on baggage carts (3.72), safe/secure feelings (4.18), FIDS (4.12), airport staff courtesy (4.04) and arrivals passport control (3.98) and customs (3.77).
- JFK also outperforms AMS on walking distance (3.52).
- JFK performs on a par with AMS on many airport elements: all check-in elements, security ID check wait time (4.02), wayfinding and FIDS (both 4.14), eating places VFM (2.98), ATMs/ MEXchngs (3.84), shopping VFM (3.16), business lounges (3.57), restroom cleanliness (3.83) and availability (4.02), terminal cleanliness (4.06) and ambience (3.93), arrivals passport control (4.02) and customs (3.83).
- JFK performs on a par with LHR on Internet/Wi-Fi access (3.86) and arrivals passport control 3.96) and bag speed (3.81).

Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent.

H4/1; L4/1: Significantly Higher/Lower than Q4 2018/Q1 2018; H/L: Significantly Higher/Lower than JFK Q1 2019; ~ Rank in Peer Panel of 7 airports; JFK N=3,073

JFK Performance vs. Peer Panel

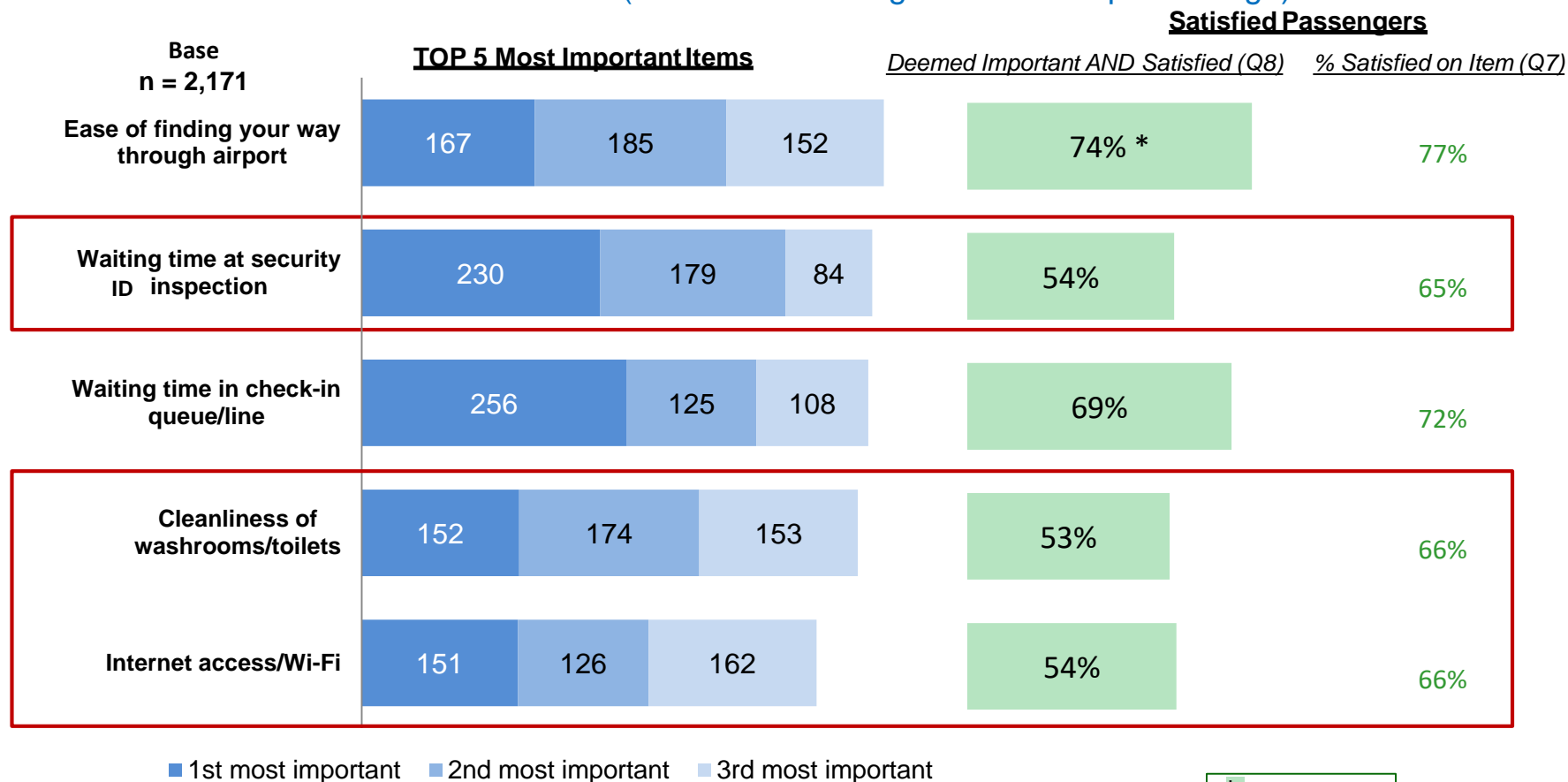
- Best in class (Peer Panel)
- Average (Peer Panel)
- JFK



JFK– Airport Performance

Top 5 Most Important Items – Satisfied Passengers

- Three of the top five airport importance elements indicate a weakness for JFK (under 70% satisfaction for those who deem the item important): wait-time at the security ID check, restroom cleanliness and Internet access/Wi-Fi (still rated much higher than two quarters ago).



Notes:

Top 5: from Q8: "Which of the items listed in Question 7 are the 1st / 2nd / 3rd most important to you at this airport?"

The figures represent the number of respondents who mention the item.

Satisfied Passengers are among the respondents who mention the item as important at Q8.

Satisfied Passengers among the respondents to Q7 items "Based on your experience today, please rate this airport on each service item".

Base is Respondents providing a valid response

* Scores 4 + 5
(Excellent+
Very Good)



EWR Satisfaction Performance

EWR Airport Performance

		EWR Q1 2019		EWR Q1 2019-18	
		-- Q4 2018		Difference	
		Difference		Difference	
		(-) (+)		(-) (+)	
		EWR Q1 2019			
Overall Satisfaction	Overall Satisfaction	3.90	0.08	0.20	H
	Business	3.76	0.17	0.17	H
	Leisure	3.95	0.05	0.21	H
	Other*	3.92	0.01	0.18	
	Leisure & Other	3.95	0.04	0.21	H
Access	Ground transportation	3.97	0.23	0.15	H
	Parking	3.59	-0.12	0.14	
	VFM: Parking facilities	2.90	-0.16	-0.06	
	Baggage carts/trolleys	3.78	0.27	0.18	
Check-in	Check-in waiting time	4.14	0.09	0.12	H
	Efficiency of staff	4.22	0.12	0.09	
	Courtesy of check-in staff	4.20	0.16	0.13	H
Security ID Check	Inspection waiting time	4.10	0.18	0.22	H
	Courtesy of inspection staff	4.13	0.19	0.14	H
Security	Courtesy of security staff	4.03	0.20	0.18	H
	Thoroughness	4.12	0.16	0.17	H
	Security waiting time	3.93	0.22	0.24	H
	Safe/secure feeling	4.21	0.14	0.17	H
Finding Way	Ease of finding way	4.17	0.12	0.20	H
	Flight info screens	4.17	0.09	0.14	H
	Walking distance	3.92	0.03	0.15	H
	Ease of connections	3.86	-0.04	0.22	
Airport Facilities	Courtesy of airport staff	4.17	0.13	0.19	H
	Eating facilities	3.69	0.04	0.13	
	VFM: Eating facilities	2.93	-0.01	0.09	
	Availability Bank/ATM/exchange	3.61	-0.07	0.04	
	Shopping facilities	3.55	0.08	0.18	H
	VFM: Shopping facilities	3.00	-0.03	0.03	
	Internet / Wi-Fi	3.85	0.06	0.74	H
	Business/Executives Lounges	3.60	0.07	0.19	
	Availability of washrooms	3.91	0.14	0.18	H
Airport Environment	Cleanliness of washrooms	3.74	0.15	0.27	H
	Comfort of waiting/gate areas	3.76	0.01	0.19	H
	Terminal cleanliness	4.03	0.08	0.24	H
	Airport Ambience	3.74	0.05	0.17	H
Arrivals Services	Passport inspection	3.97	0.05	0.03	
	Baggage delivery speed	3.75	0.04	0.11	
	Customs inspection	3.85	0.08	0.04	

→ EWR passenger satisfaction increased significantly overall this quarter, Q1 2019, (3.90) versus YOY (Q1 2018) and for both leisure and business travelers (the latter also up significantly since last quarter – Q4 2018). Many airport elements improved significantly YOY and since last quarter, Q4 2018:

- Ground transportation (3.97).
- Check-in staff courtesy (4.20)
- All security check elements
- Wayfinding (4.17)
- Airport staff courtesy (4.17)
- Restroom cleanliness (3.74) and availability (3.91)
- Terminal cleanliness (4.03).

→ Satisfaction with other airport elements improved significantly only YOY (vs. Q1 2018), such as check-in wait time (4.14), FIDS (4.17), walking distance (3.92), shopping facilities (3.55), airport ambience (3.74) and Internet/Wi-Fi availability (3.85) – an especially strong improvement.

→ Satisfaction with other elements improved only since last quarter, Q4 2018: baggage carts (3.78) and check-in staff efficiency (4.22, also the highest scoring airport element in Q1 2019). Parking facilities VFM (2.90) was the lowest scoring.

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.

H/L: Q1 2019 (N=991) significantly Higher/Lower than Q4 2018 or Q1 2018.

EWR Airport Performance vs. Peer Panel

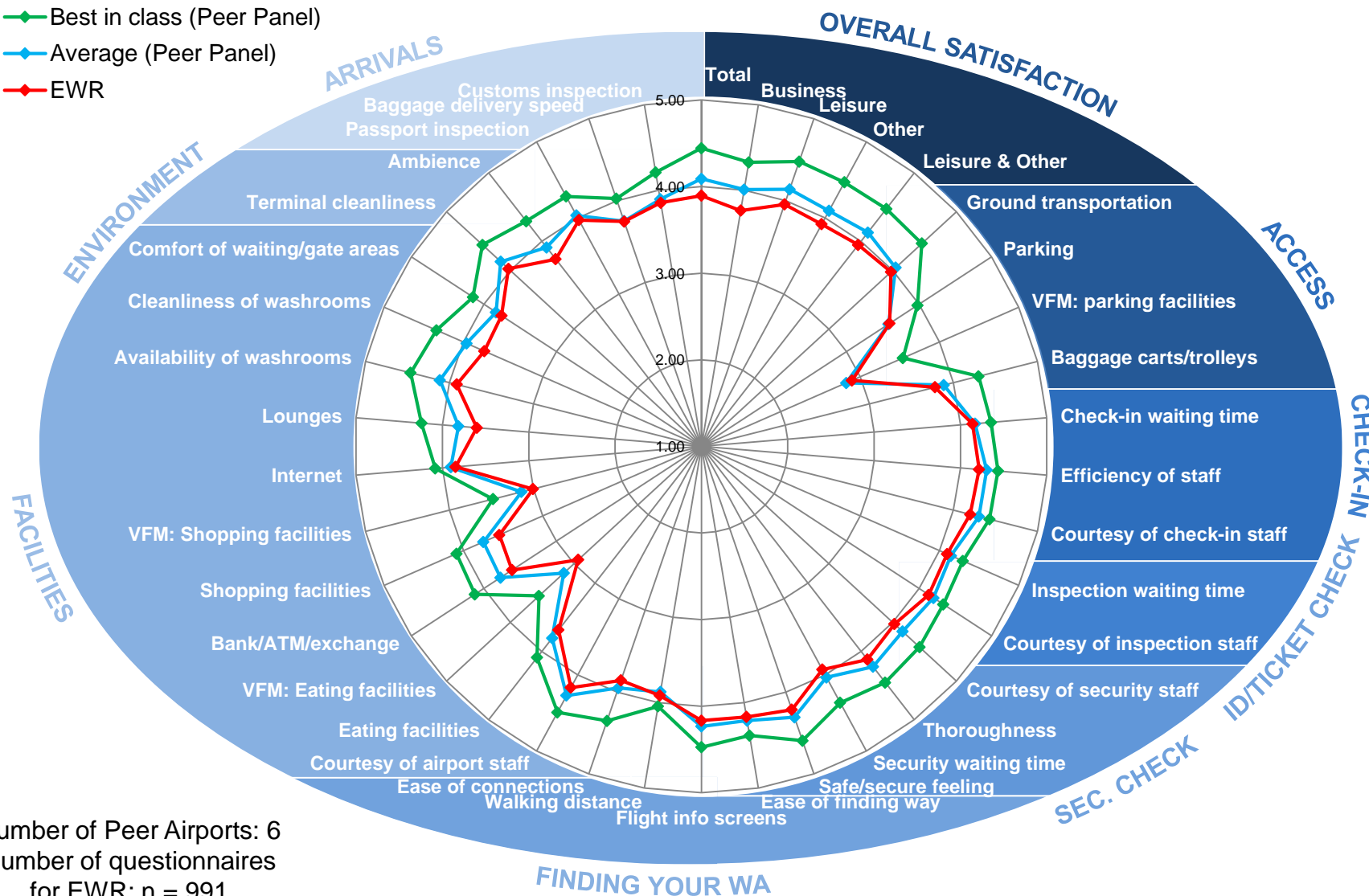
			Peer Panel	EWR Rank~	BOS	MSP	MUC	SEA	YYZ
Overall Satisfaction	Overall Satisfaction	3.90 H1	4.09 H	6	4.16 H	4.31 H	4.14 H	3.98 H	4.44 H
	Business	3.76 H4/1	4.01 H	6	4.05 H	4.27 H	4.12 H	3.89	4.33 H
	Leisure	3.95 H1	4.14 H	6	4.26 H	4.35 H	4.17 H	3.99	4.48 H
	Other*	3.92	4.09 H	6	4.03	4.23 H	4.09	4.10	4.47 H
	Leisure & Other	3.95 H1	4.13 H	6	4.21 H	4.33 H	4.16 H	4.01	4.48 H
Access	Ground transportation	3.97 H4/1	4.05	5	4.05	4.46 H	3.86	4.07	4.22 H
	Parking	3.59	3.58	4	3.48	3.98 H	3.66	3.43	3.83
	VFM: Parking facilities	2.90	2.82	4	2.53 L	3.27	2.37 H	2.91	3.54 H
	Baggage carts/trolleys	3.78 H4	3.89	6	3.80	4.10 H	3.80	3.81	4.30 H
Check-in	Check-in waiting time	4.14 H1	4.17	3	4.28 H	4.10	4.04	4.09	4.35 H
	Efficiency of staff	4.22 H4	4.30 H	5	4.34 H	4.44 H	4.16	4.32 H	4.41 H
	Courtesy of check-in staff	4.20 H4/1	4.30 H	5	4.28	4.43 H	4.18	4.38 H	4.41 H
Security ID Check	Inspection waiting time	4.10 H4/1	4.15	4	4.26 H	4.07	4.14	4.06	4.30 H
	Courtesy of inspection staff	4.13 H4/1	4.20	5	4.24 H	4.26	4.09	4.23 H	4.34 H
Security	Courtesy of security staff	4.03 H4/1	4.16 H	6	4.20 H	4.27 H	4.04	4.15 H	4.42 H
	Thoroughness	4.12 H4/1	4.23 H	6	4.27 H	4.32 H	4.14	4.20	4.46 H
	Security waiting time	3.93 H4/1	4.03 H	5	4.13 H	4.13 H	4.01	3.89	4.37 H
	Safe/secure feeling	4.21 H4/1	4.31 H	6	4.30 H	4.41 H	4.27	4.28	4.59 H
Finding Way	Ease of finding way	4.17 H4/1	4.21	4	4.29 H	4.38 H	4.11	4.13	4.35 H
	Flight info screens	4.17 H1	4.23	5	4.29 H	4.42 H	4.11	4.18	4.47 H
	Walking distance	3.92 H1	3.87	3	4.04 H	3.85	3.57 L	3.81 L	4.04 H
	Ease of connections	3.86	3.95	5	4.00	3.89	4.01	3.84	4.35 H
Airport Facilities	Courtesy of airport staff	4.17 H4/1	4.27 H	5	4.29 H	4.44 H	4.14	4.28 H	4.49 H
	Eating facilities	3.69	3.80 H	6	3.78	4.04 H	3.76	3.78	4.09 H
	VFM: Eating facilities	2.93	3.16 H	6	3.34 H	3.30 H	2.95	3.12 H	3.55 H
	Availability Bank/ATM/exchange	3.61	3.77	6	3.81 H	3.86	3.70	3.69	4.12 H
	Shopping facilities	3.55 H1	3.75 H	6	3.65	4.09 H	3.89 H	3.70 H	3.99 H
	VFM: Shopping facilities	3.00	3.14 H	6	3.20 H	3.33 H	3.08	3.08	3.48 H
	Internet / Wi-Fi	3.85 H1	3.90	5	3.99 H	4.08 H	3.72	3.85	4.06 H
	Business/Executives Lounges	3.60	3.81	6	3.88	4.04 H	3.84	3.68	4.24 H
	Availability of washrooms	3.91 H4/1	4.11 H	6	4.21 H	4.35 H	4.15 H	3.98	4.46 H
	Cleanliness of washrooms	3.74 H4/1	3.96 H	6	4.00 H	4.30 H	4.14 H	3.79	4.34 H
Airport Environment	Comfort of waiting/gate areas	3.76 H1	3.83 H	5	4.01 H	4.00 H	3.87 H	3.58 L	4.15 H
	Terminal cleanliness	4.03 H4/1	4.15 H	5	4.21 H	4.38 H	4.35 H	3.93 L	4.44 H
Arrivals Services	Airport Ambience	3.74 H1	3.91 H	5	3.96 H	4.20 H	4.06 H	3.72	4.29 H
	Passport inspection	3.97	4.03	5	3.98	4.28 H	3.93	4.02	4.26 H
	Baggage delivery speed	3.75	3.75	4	3.60 L	4.03 H	3.53 H	3.85	3.99 H
	Customs inspection	3.85	3.89	5	3.71 L	4.04	3.89	3.91	4.21 H

- EWR also significantly underperforms the peer panel airports on passenger satisfaction overall and on many airport elements, although EWR's rank among the six peer airports has improved, especially on:
- check-in wait-time (EWR: 4.14 vs. Peer Panel: 4.17; EWR rank 3),
 - walking distance (3.92 vs. 3.87; 3),
 - wayfinding (4.17 vs. 4.21, 4),
 - parking (3.59 vs. 3.58, 4),
 - parking value for the money -VFM (2.90 vs. 2.82, 4)
 - arrivals bag speed (3.75 for both, 4).
- EWR outperforms BOS on parking VFM (2.53) and arrivals bag speed (3.60) and customs (3.71), MUC on walking distance (3.57) and SEA on walking distance (3.81), comfort at the gate (3.58) and terminal cleanliness (3.93).
- EWR performs on a par with MUC and SEA on all airport access elements (except parking VFM -- MUC), all check-in elements (except staff efficiency and courtesy -- SEA), all security check elements (except security check ID verifying staff and TSA courtesy -- SEA), most wayfinding elements, arrivals passport control and customs, and most airport facility elements (except shopping facilities -- MUC/SEA, airport staff courtesy -- SEA, eating facilities VFM -- SEA, restroom cleanliness and ambience and comfort at the gate -- MUC).
- EWR performs on a par with BOS on most airport access elements, check-in staff courtesy (4.28), connections (4.00), eating facilities (3.78), shopping facilities (3.65), business lounges (3.88) and arrivals passport control (3.98).
- EWR performs on a par with MSP on parking VFM (3.27), check-in wait-time (4.10), security ID check wait-time (4.07) and staff courtesy (4.26), walking distance (3.85), connections (3.89), ATMs/MExchngs (3.86), and arrivals customs (4.04).

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.
H4/1; L4/1: Significantly Higher/Lower than Q4 2018/Q1 2018; H/L: Significantly Higher/Lower than EWR Q1 2019; ~ Rank in Peer Panel of 6 airports; EWR N=991.

EWR Performance vs. Peer Panel

- Best in class (Peer Panel)
- Average (Peer Panel)
- EWR

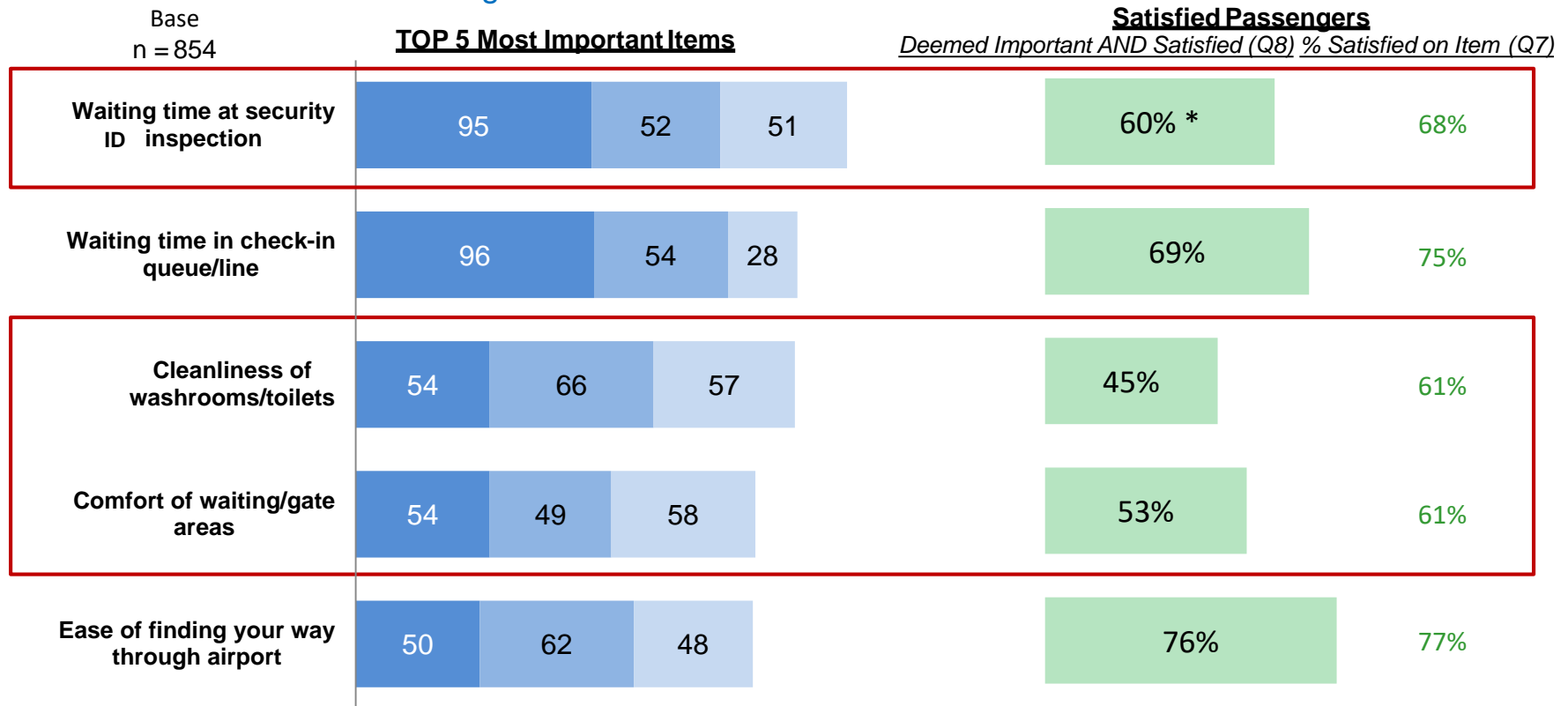


Number of Peer Airports: 6
 Number of questionnaires
 for EWR: n = 991

EWR– Airport Performance

Top 5 Most Important Items – Satisfied Passengers

- Three of the top five airport importance elements indicate a weakness for EWR (under 70% satisfaction for those who deem the item important): wait-time at the security ID check and, especially restroom cleanliness and comfort of the gate area.



■ 1st most important ■ 2nd most important ■ 3rd most important

Notes:

Top 5: from Q8: "Which of the items listed in Question 7 are the 1st / 2nd / 3rd most important to you at this airport?"

The figures represent the number of respondents who mention the item.

Satisfied Passengers are among the respondents who mention the item as important at Q8.

Satisfied Passengers among the respondents to Q7 items "Based on your experience today, please rate this airport on each service item".

Base is Respondents providing a valid response

* Scores 4 + 5
(Excellent+
Very Good)



LGA Satisfaction Performance

LGA Airport Performance

LGA Q1 2019

-- Q4 2018

Difference

(-) (+)

LGA Q1

2019-18

Difference

(-) (+)



		LGA					
		Q1 2019					
Overall Satisfaction	Overall Satisfaction	3.82		0.26	H	0.16	H
	Business	3.65		0.31	H	0.16	
	Leisure	3.92		0.28	H	0.23	H
	Other*	3.88		0.22		0.08	
	Leisure & Other	3.91		0.27	H	0.20	H
Access	Ground transportation	3.44	-0.10			-0.15	L
	Parking	2.99	-0.05			-0.13	
	VFM: Parking facilities	2.72	-0.04			0.01	
	Baggage carts/trolleys	3.46	-0.12			-0.15	
Check-in	Check-in waiting time	4.37		0.11	H	0.03	
	Efficiency of staff	4.38		0.08		0.06	
	Courtesy of check-in staff	4.30		0.06		0.08	
Security ID Check	Inspection waiting time	4.33		0.11	H	0.03	
	Courtesy of inspection staff	4.24		0.06		0.10	
Security	Courtesy of security staff	4.14		0.07		0.12	H
	Thoroughness	4.22		0.04		0.08	
	Security waiting time	4.24		0.12	H	0.07	
	Safe/secure feeling	4.31		0.06		0.09	H
Finding Way	Ease of finding way	4.19		0.16	H	0.17	H
	Flight info screens	4.22		0.18	H	0.17	H
	Walking distance	4.07		0.09	H	0.01	
	Ease of connections	3.99		0.24		-0.11	
Airport Facilities	Courtesy of airport staff	4.24		0.10	H	0.11	H
	Eating facilities	3.63		0.30	H	0.17	H
	VFM: Eating facilities	2.95		0.09		0.05	
	Availability Bank/ATM/exchange	3.58		0.08		-0.03	
	Shopping facilities	3.37		0.25	H	0.07	
	VFM: Shopping facilities	2.90		0.01		-0.07	
	Internet / Wi-Fi	3.80		0.14		0.52	H
	Business/Executives Lounges	3.55		0.19		0.12	
	Availability of washrooms	3.96		0.29	H	0.26	H
	Cleanliness of washrooms	3.77		0.21	H	0.25	H
Airport Environment	Comfort of waiting/gate areas	3.71		0.36	H	0.30	H
Arrivals Services	Terminal cleanliness	3.87		0.30	H	0.22	H
	Airport Ambience	3.55		0.31	H	0.19	H
Arrivals Services	Passport inspection	NA		NA		NA	
	Baggage delivery speed	3.82		0.04		0.05	
	Customs inspection	NA		NA		NA	

- LGA passenger satisfaction improved significantly overall (3.82) YOY (vs. Q1 2018) and since last quarter (Q4 2018) as well as among leisure paxs. and on a number of airport elements, such as wayfinding (4.19), FIDS (4.22), airport staff courtesy (4.24), eating facilities (3.63), restroom cleanliness (3.77) and availability (3.96), terminal cleanliness (3.87) and ambience (3.55) and comfort at the gate (3.71).
- Satisfaction with some airport elements improved significantly only YOY, such as security check ID staff courtesy (4.14), safe/secure feeling (4.31), Internet/Wi-Fi availability (3.80).
- Satisfaction with other elements improved significantly only since last quarter (Q4 2018), such as check-in wait time (4.37), security check wait time for ID verification (4.33) and at the magnetometer (4.24), walking distance (4.07) and shopping facilities (3.37).
- Check-in staff efficiency (4.38) is the highest scoring element in Q1 2019; parking facilities value for the money, VFM, is the lowest scoring (2.72).

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: Q1 2019 (N=1,006) significantly Higher/Lower than Q4 2018 or Q1 2018.

LGA Airport Performance vs. Peer Panel

				Peer Panel	LGA Rank~	BOS	BWI	FLL	MSP	PHL
Overall Satisfaction	Overall Satisfaction	3.82 H4/1	4.07 H	6	4.16 H	4.26 H	4.04 H	4.31 H	4.05 H	
	Business	3.65 H4	3.96 H	6	4.05 H	4.19 H	4.02 H	4.27 H	3.95 H	
	Leisure	3.92 H4/1	4.15 H	6	4.26 H	4.31 H	4.07 H	4.35 H	4.10 H	
	Other*	3.88	4.03	6	4.03	4.18 H	3.94 H	4.23 H	4.04	
	Leisure & Other	3.91 H4/1	4.12 H	6	4.21 H	4.28 H	4.05 H	4.33 H	4.09 H	
Access	Ground transportation	3.44	3.96 H	6	4.05 H	4.30 H	4.14 H	4.46 H	4.03 H	
	Parking	2.99	3.74 H	6	3.48 H	4.19 H	3.87 H	3.98 H	3.80 H	
	VFM: Parking facilities	2.72	3.22 H	5	2.53	3.60 H	3.68 H	3.27 H	3.41 H	
	Baggage carts/trolleys	3.46	3.79 H	6	3.80 H	3.99 H	3.90 H	4.10 H	3.77 H	
Check-in	Check-in waiting time	4.37 H4	4.28 L	1	4.28 H	4.32	4.15 L	4.10 L	4.34	
	Efficiency of staff	4.38	4.36	3	4.34	4.40	4.31	4.44	4.35	
	Courtesy of check-in staff	4.30	4.32	4	4.28	4.39	4.34	4.43 H	4.29	
Security ID Check	Inspection waiting time	4.33 H4	4.27	1	4.26	4.27	4.23 L	4.07	4.27	
	Courtesy of inspection staff	4.24	4.25	6	4.24	4.25	4.26	4.26	4.25	
Security	Courtesy of security staff	4.14 H1	4.20	6	4.20	4.20	4.22	4.27 H	4.22	
	Thoroughness	4.22	4.27	6	4.27	4.26	4.31 H	4.32	4.28	
	Security waiting time	4.24 H4	4.17 L	1	4.13 L	4.07 L	4.17	4.13	4.22	
	Safe/secure feeling	4.31 H1	4.33	5	4.30	4.35	4.37	4.41	4.33	
Finding Way	Ease of finding way	4.19 H4/1	4.31 H	6	4.29 H	4.47 H	4.33 H	4.38 H	4.31 H	
	Flight info screens	4.22 H4/1	4.34 H	6	4.29	4.48 H	4.30	4.42 H	4.38 H	
	Walking distance	4.07 H4	4.01	3	4.04	4.14	4.08	3.85 L	3.89 L	
	Ease of connections	3.99	4.06	3	4.00	4.42 H	3.91	3.89	3.99	
Airport Facilities	Courtesy of airport staff	4.24 H4/1	4.30	6	4.29	4.39 H	4.30	4.44 H	4.25	
	Eating facilities	3.63 H4/1	3.85 H	5	3.78 H	4.16 H	3.61	4.04 H	3.97 H	
	VFM: Eating facilities	2.95	3.31 H	6	3.34 H	3.77 H	3.26 H	3.30 H	3.32 H	
	Availability Bank/ATM/exchange	3.58	3.84 H	6	3.81 H	3.94 H	3.93 H	3.86 H	3.95 H	
	Shopping facilities	3.37 H4	3.75 H	6	3.65 H	3.95 H	3.73 H	4.09 H	3.91 H	
	VFM: Shopping facilities	2.90	3.22 H	6	3.20 H	3.47 H	3.22 H	3.33 H	3.30 H	
	Internet / Wi-Fi	3.80 H1	3.88	6	3.99 H	3.81	3.89	4.08 H	3.81	
	Business/Executives Lounges	3.55	3.78 H	6	3.88 H	3.82	3.72	4.04 H	3.87 H	
	Availability of washrooms	3.96 H4/1	4.17 H	6	4.21 H	4.32 H	4.14 H	4.35 H	4.17 H	
	Cleanliness of washrooms	3.77 H4/1	3.94 H	6	4.00 H	4.09 H	4.02 H	4.30 H	3.79	
Airport Environment	Comfort of waiting/gate areas	3.71 H4/1	3.88 H	6	4.01 H	4.00 H	3.84 H	4.00 H	3.81 H	
	Terminal cleanliness	3.87 H4/1	4.11 H	6	4.21 H	4.34 H	4.08 H	4.38 H	4.04 H	
Arrivals Services	Airport Ambience	3.55 H4/1	3.89 H	6	3.96 H	4.13 H	3.89 H	4.20 H	3.86 H	
	Passport inspection	NA	4.14	NA	3.98	4.20	4.27	4.28	4.16	
	Baggage delivery speed	3.82	3.75	3	3.60 L	3.78	3.92	4.03 H	3.67 L	
	Customs inspection	NA	3.93	NA	3.71	4.02	4.09	4.04	3.96	

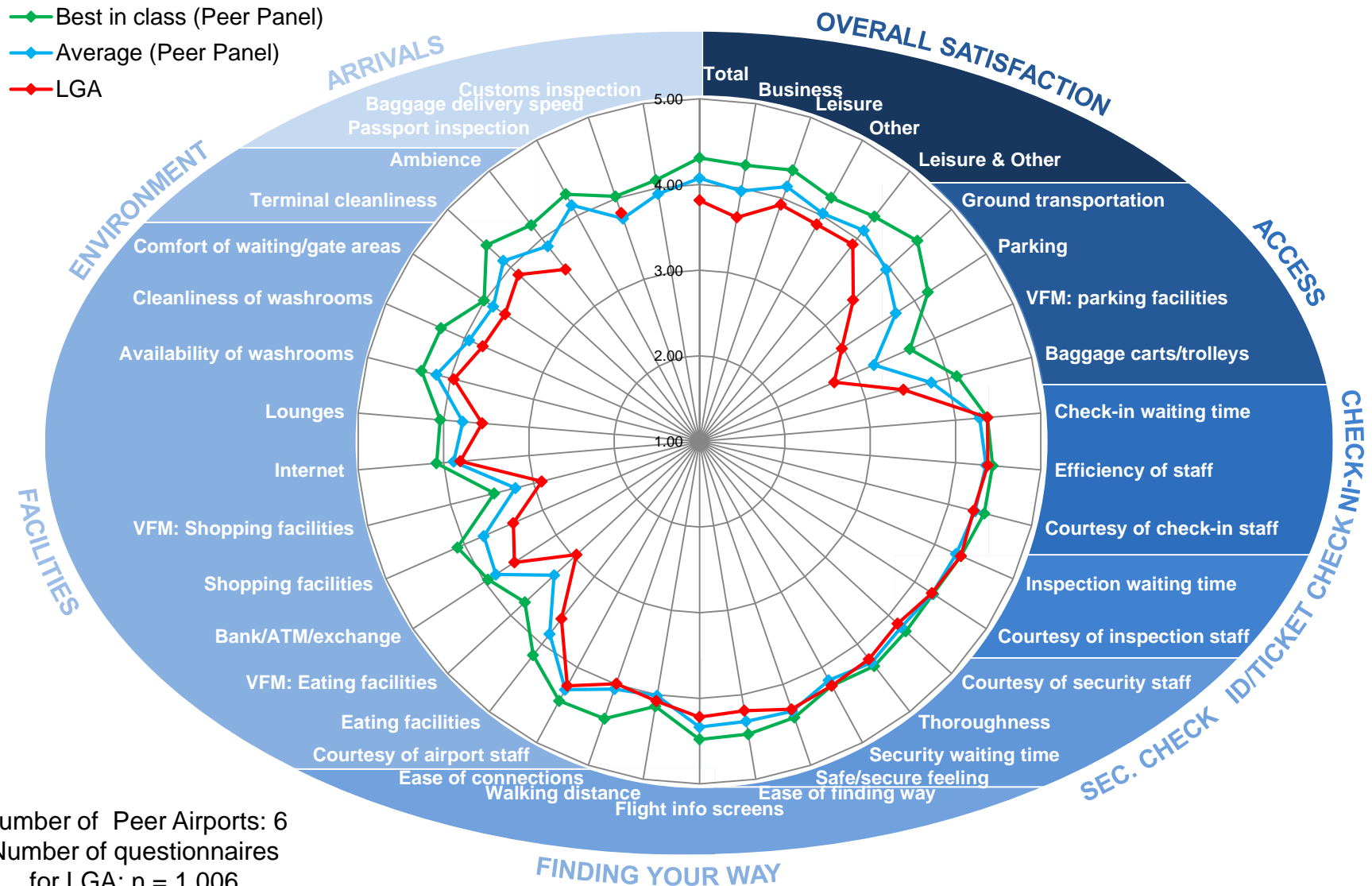
→ LGA significantly under-performs the peer panel airports on passenger satisfaction overall and on many airport elements.

→ However, LGA outperforms FLL and MSP on check-in wait-time (4.15 and 4.10, respectively), FLL on security ID check wait-time (4.23), BOS and BWI on security check TSA wait-time (4.13 and 4.07, respectively), MSP and PHL on waking distance (3.85 and 3.89, respectively), and BOS and PHL on arrivals bag speed (3.60 and 3.67, respectively).

→ LGA performs on a par with the peer airports on all check-in elements (except MSP on staff courtesy – 4.43), where it now ranks 1, 3 and 4 out of 6 peer airports, also on all security check elements (except FLL on thoroughness – 4.31 and MSP on TSA courtesy – 4.27), where it now ranks 1 on security ID check (4.33) and security TSA (4.24) wait-times, walking distance (4.07), connections (3.99) – both ranked 3, airport staff courtesy (4.24), Internet/Wi-Fi access (3.80) and arrivals bag speed (3.82) – ranked 3.

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; H4/1 L4/1: Significantly Higher/Lower than Q4 2018/Q1 2018; H/L: Significantly Higher/Lower than LGA Q1 2019; ~ Rank in Peer Panel of 6 airports. LGA Q1 2019 N=1,006.

LGA Performance vs. Peer Panel

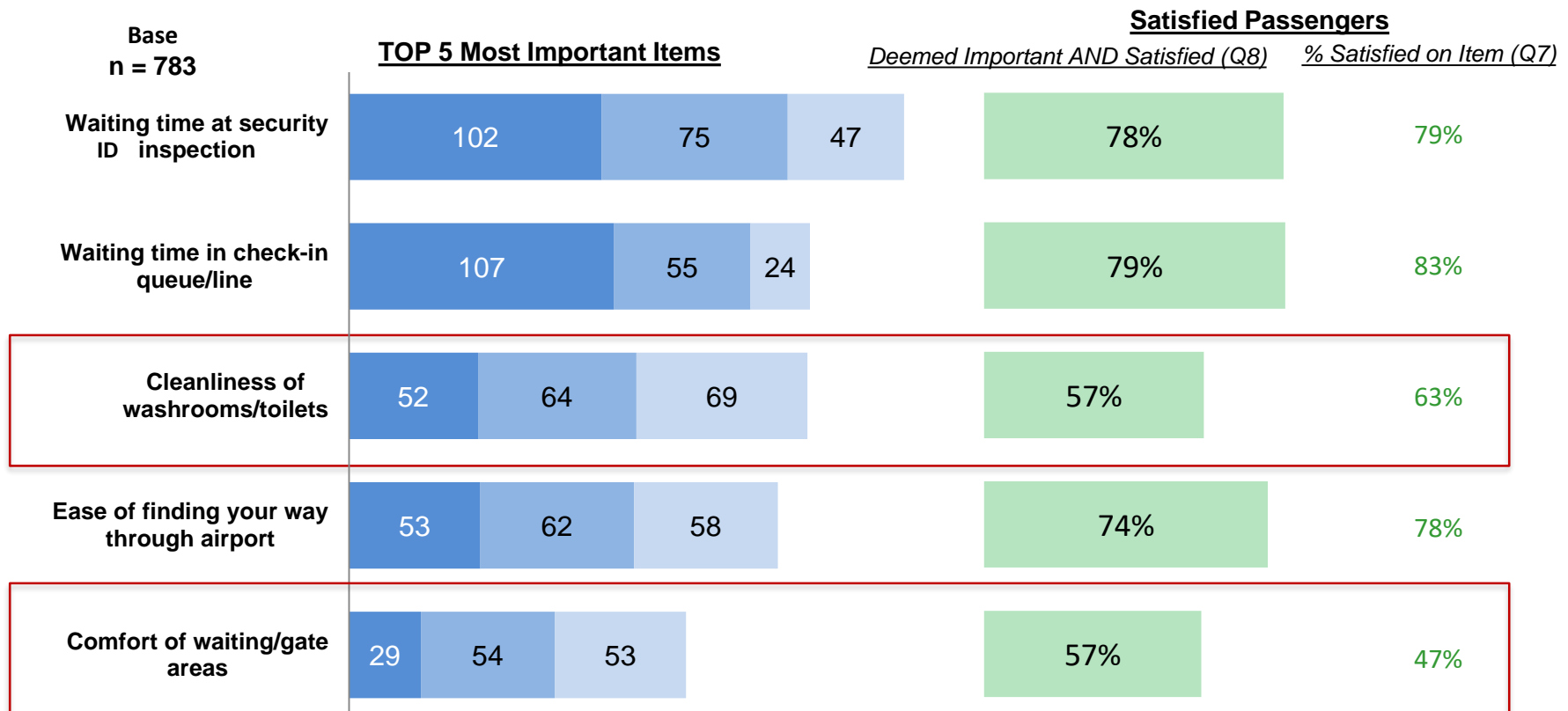


Number of Peer Airports: 6
Number of questionnaires
for LGA: n = 1,006

LGA– Airport Performance

Top 5 Most Important Items – Satisfied Passengers

- Two of the top five airport importance elements below indicate a weakness for LGA (under 70% satisfaction for those who deem the item important): restroom cleanliness and comfort of the gate area.



■ 1st most important ■ 2nd most important ■ 3rd most important

Notes:

Top 5: from Q8: "Which of the items listed in Question 7 are the 1st / 2nd / 3rd most important to you at this airport?"
The figures represent the number of respondents who mention the item.

Satisfied Passengers are among the respondents who mention the item as important at Q8.

Satisfied Passengers among the respondents to Q7 items "Based on your experience today, please rate this airport on each service item".

Base is Respondents providing a valid response

* Scores 4 + 5
(Excellent+
Very Good)

Thank You!



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