



J.D. POWER

2018 Airport Satisfaction StudySM

New York LaGuardia - LGA

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Summary of Findings

LGA improved in all factor areas, resulting in a significant 24 point increase in overall satisfaction, the 5th largest improvement in the study, but not enough to improve its ranking

Key Takeaways

- Given that LGA is undergoing the most conspicuous renovation project in the world, its ranking and point swings are not unexpected.
- Terminal Facilities and Accessibility are the areas most affected by the current construction. These are also the two most heavily weighted factors in the satisfaction model.
- As with all PANYNJ airports, the per-person spending on non-aeronautical revenues improves dramatically with higher satisfaction. This is a major opportunity for LGA and the other PANYNJ airports.
- Baggage Claim factor has the smallest gap between LGA and the Large airport segment average. 61% of LGA passengers wait less than 16 minutes or longer for their baggage.

Recommended Actions

- Completion of current construction will eventually address the Access and Terminal Facilities scores.
- Temporary signage during construction can help some Access scores but this signage must be placed ahead of decision points and be extraordinarily visible.
- DOT Signage on Grand Central Parkway is inconsistent and inadequate and adds to the frustration of accessing LGA during construction. Seek partnership with NYDOT.
- Increase number and capacity of restrooms at LGA to match passenger volume.
- Wi-Fi at LGA is considered to be as fast or faster than expected. It is key to maintain this as the new terminals begin operations.

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

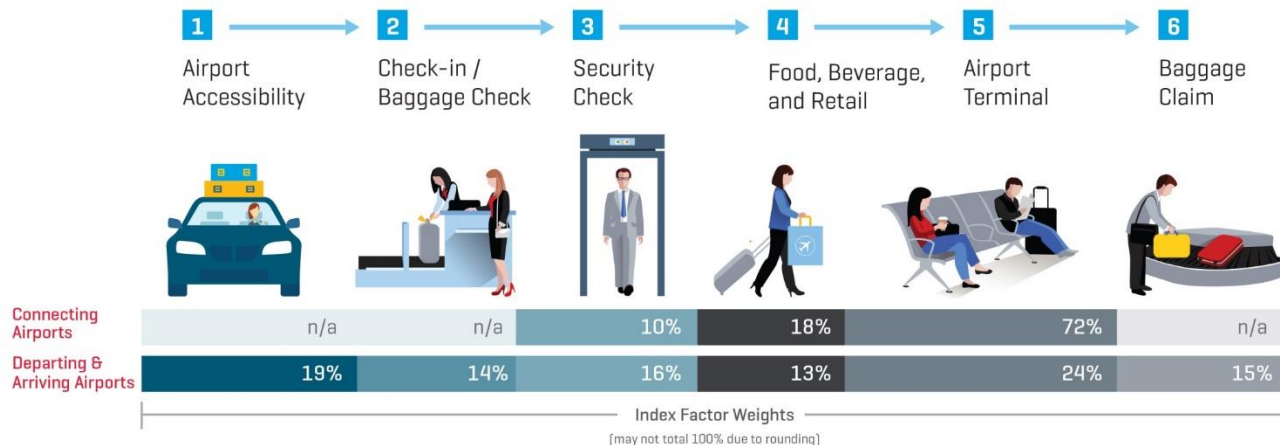
Large – 500 responses

LGA – 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.



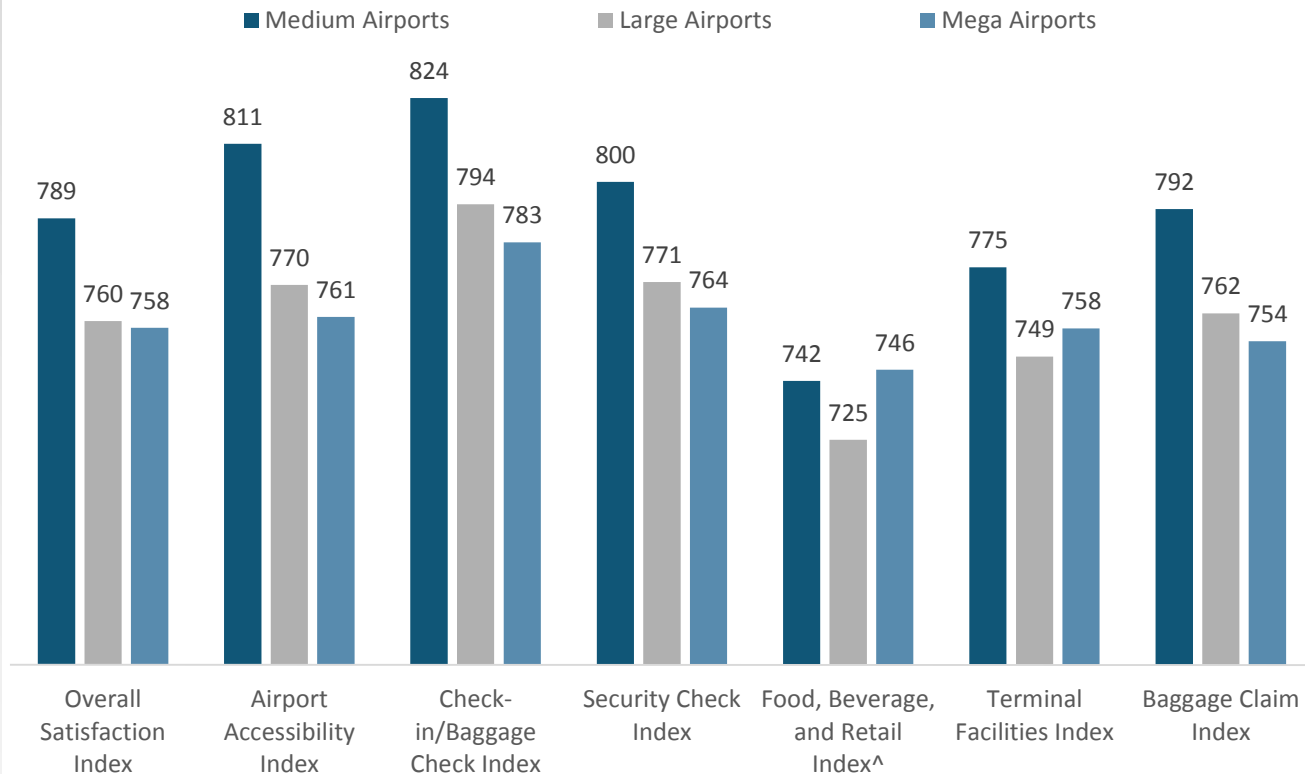


Overall Performance

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

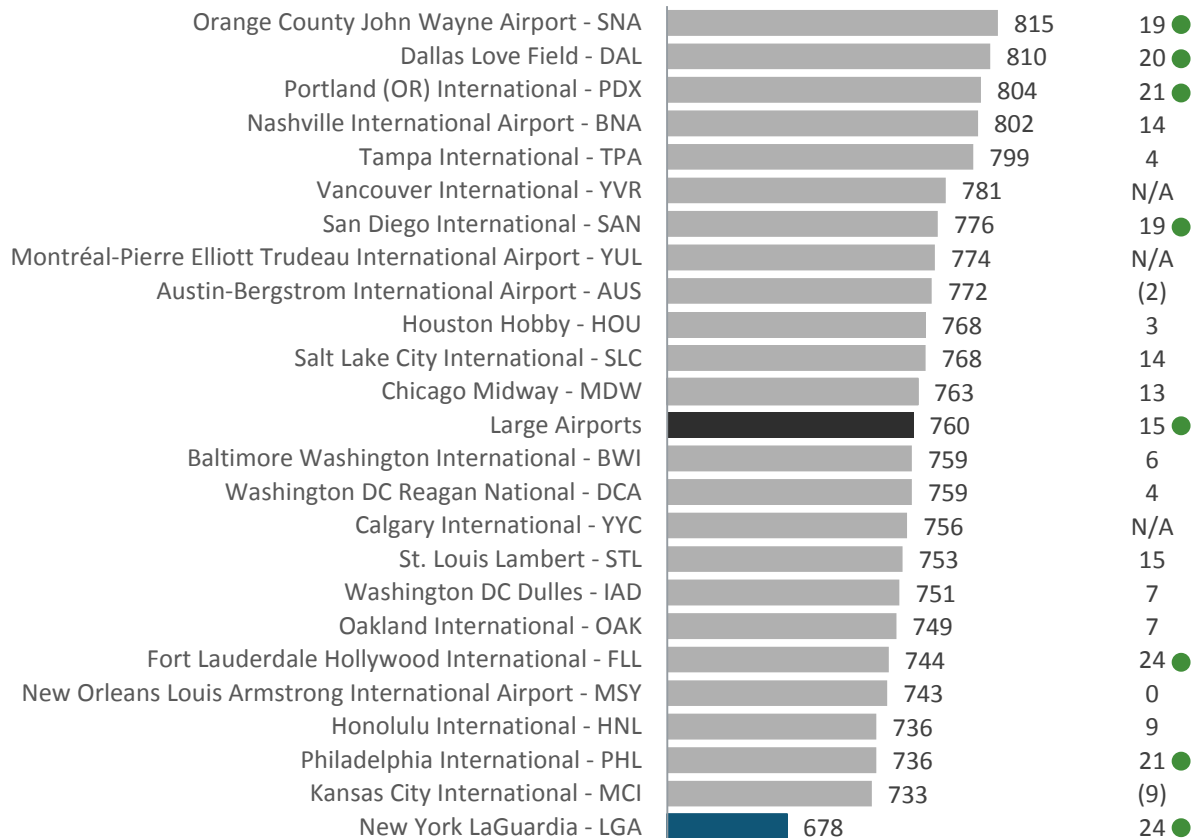
LGA ranks 24th in Overall Satisfaction

LGA improves a significant 24 points year over year while the Large airport segment makes a significant 15 point improvement.

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: Large Airports

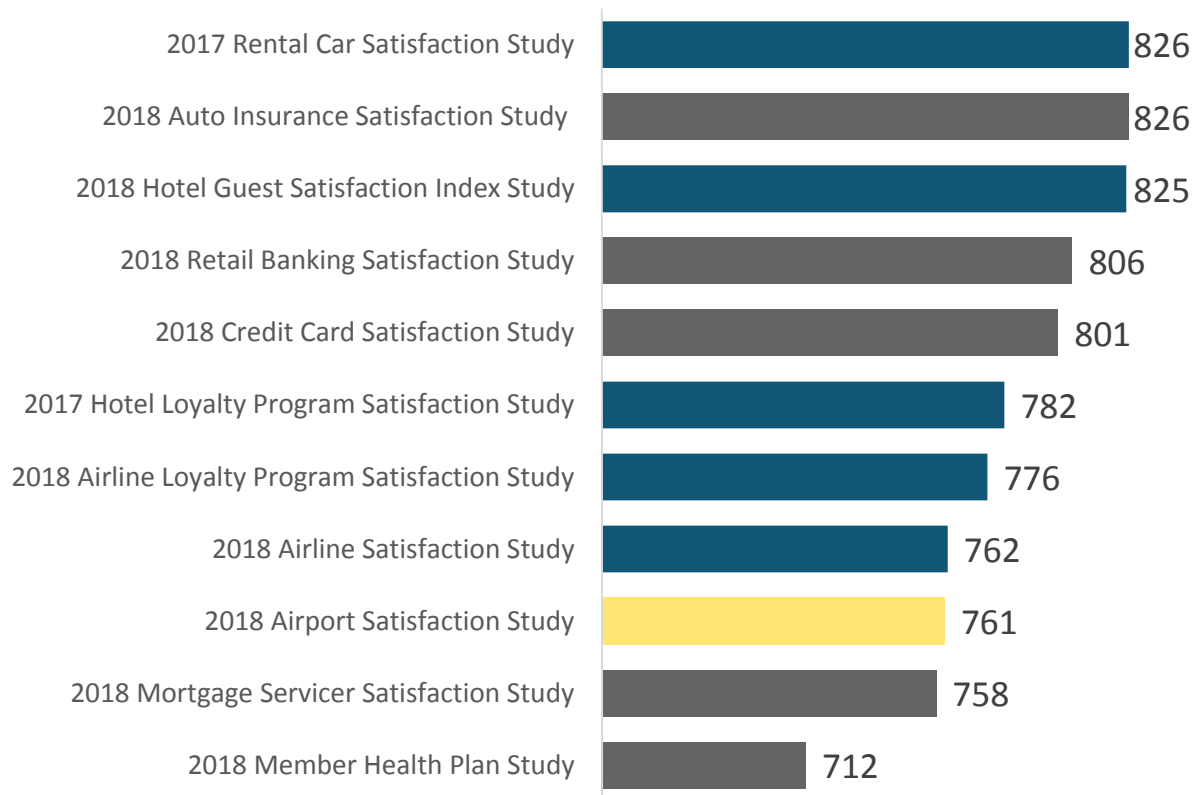
Change vs
2017



How Do Airports Stack Up?

Airport satisfaction is on par with Airline satisfaction

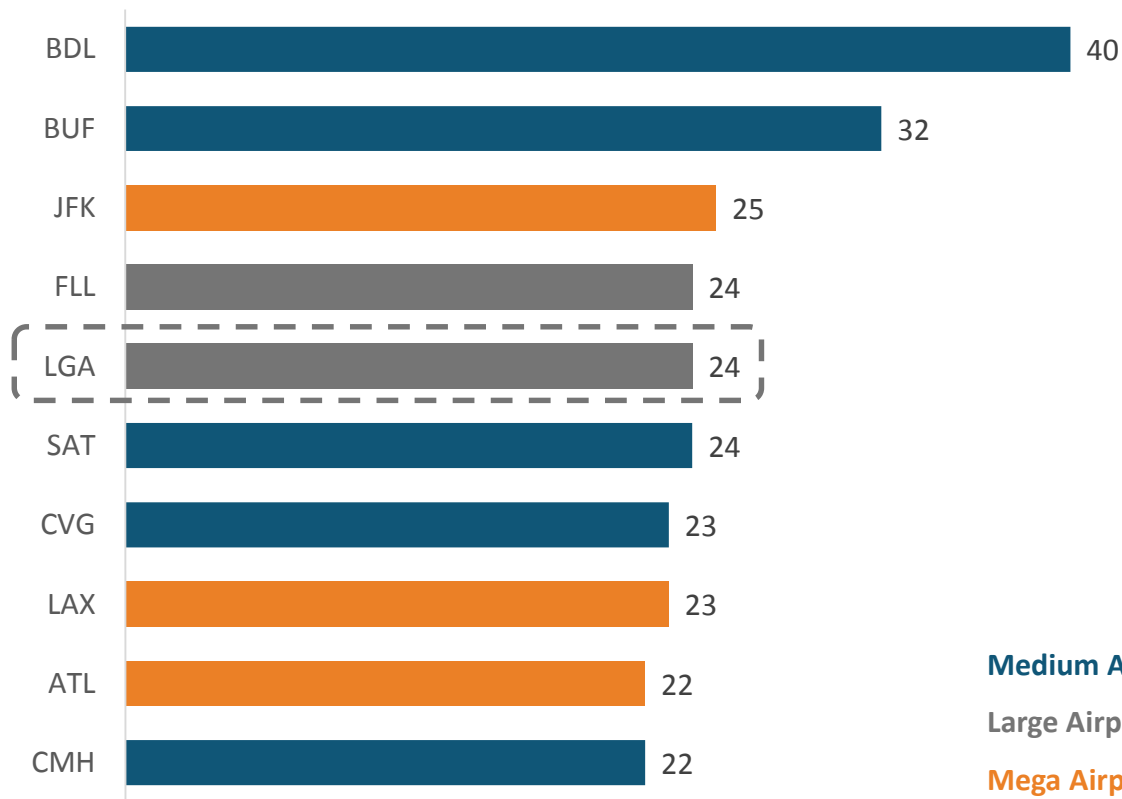
Cross Industry Rankings (Service Industries)



Most Improved Airports

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

2018 Most Improved Airports



Note: Top 10 most improved airports shown

Factor Performance

LGA improved in every factor from the previous year

While LGA scores below the Large airport average in every factor Baggage Claim factor has the smallest gap, 30 point difference between LGA and the Large airport segment

Factor Performance

		New York LaGuardia - LGA	New York LaGuardia - LGA 2017	Large Airports
Airport Accessibility Index	+34	639	605	770
Check-in/Baggage Check Index	+33	717	684	794
Security Check Index	+14	702	688	771
Food, Beverage, and Retail Index^	+21	667	646	725
Terminal Facilities Index	+22	663	641	749
Baggage Claim Index	+21	732	711	762

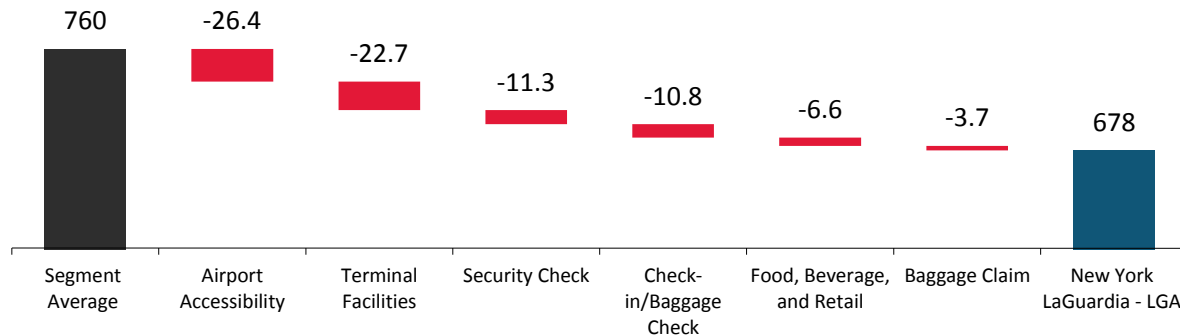
Note: ^Based to those who purchased food/beverage and/or merchandise/services while at the airport

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

SWOOP Brand v. Segment

Compared to the Large airport average, LGA's biggest weakness is in the Airport Accessibility factor

LGA vs. Large Airport Segment



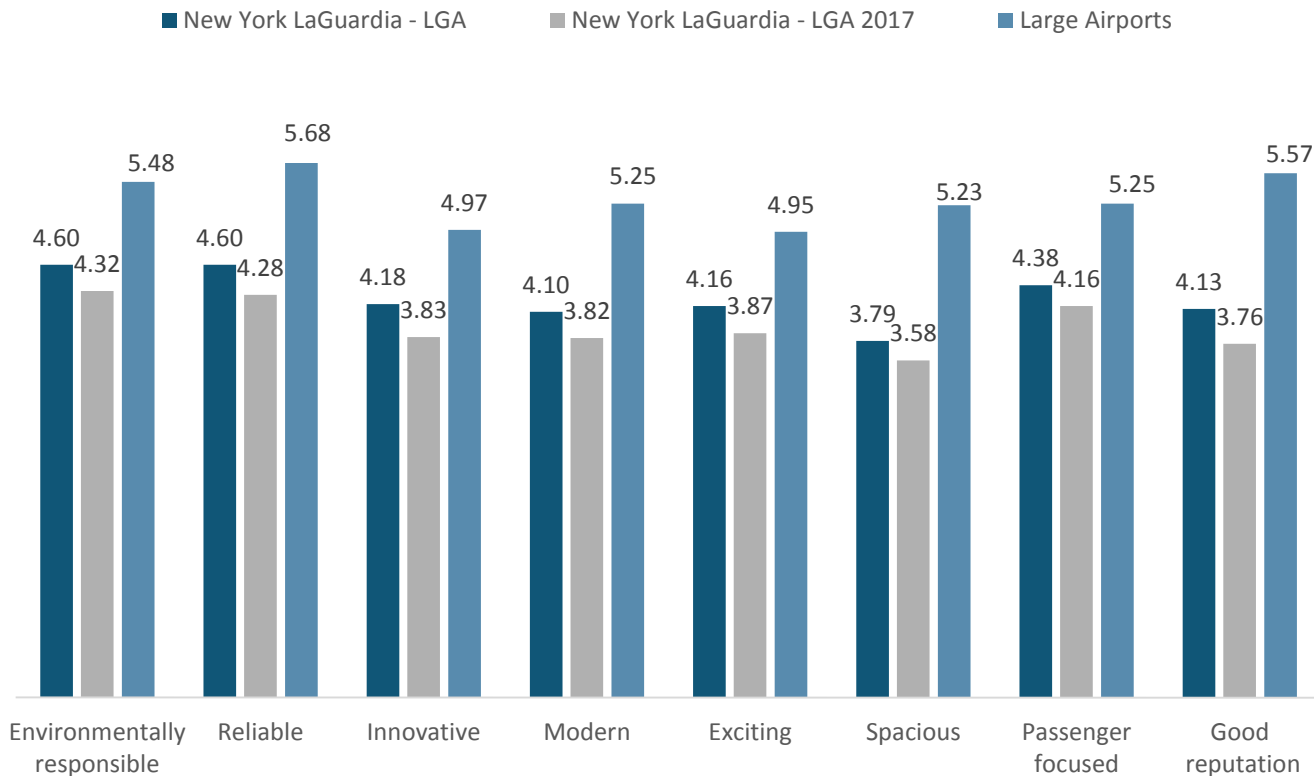
Brand Image

LGA made improvements in every brand image area from 2017

LGA had the greatest improvement in “Good reputation” year over year

LGA scores highest in “Environmentally responsible” and “Reliable”

Brand Image Performance

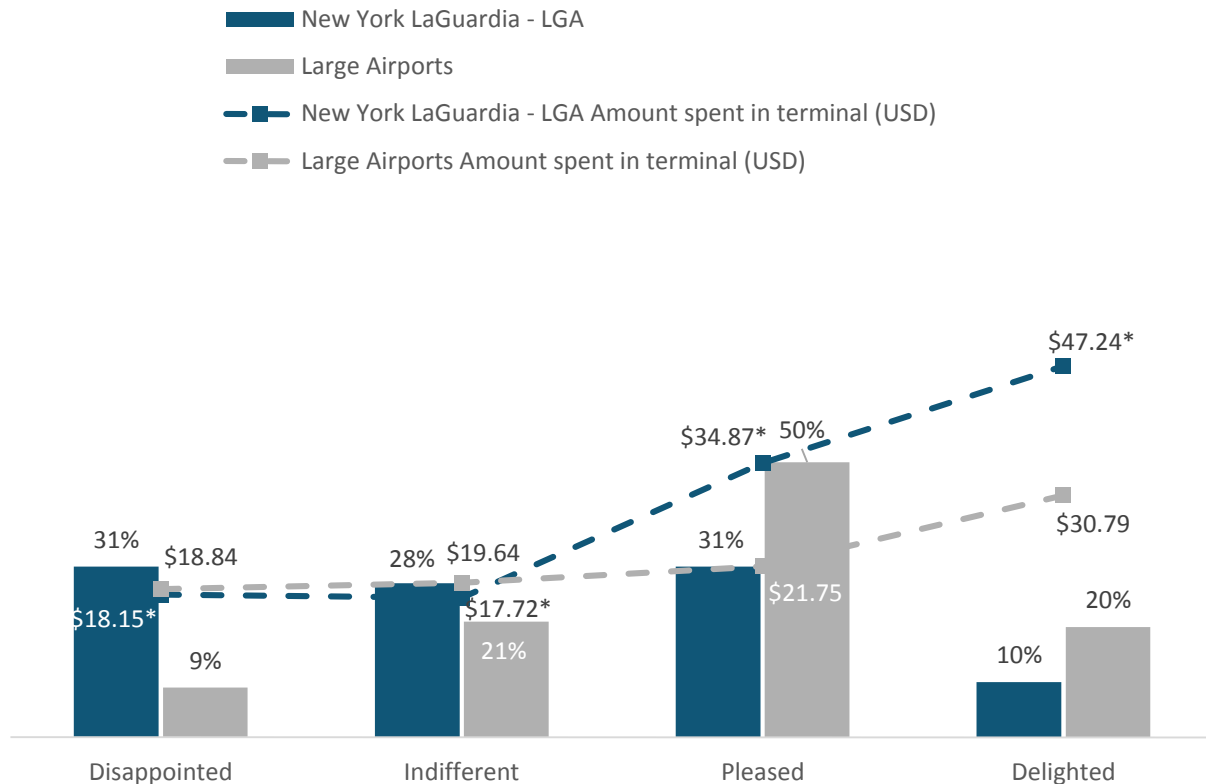


The ROI of Satisfaction

Delighted passengers spend more

Delighted passengers at Large airports spend approximately \$9 more than pleased passengers

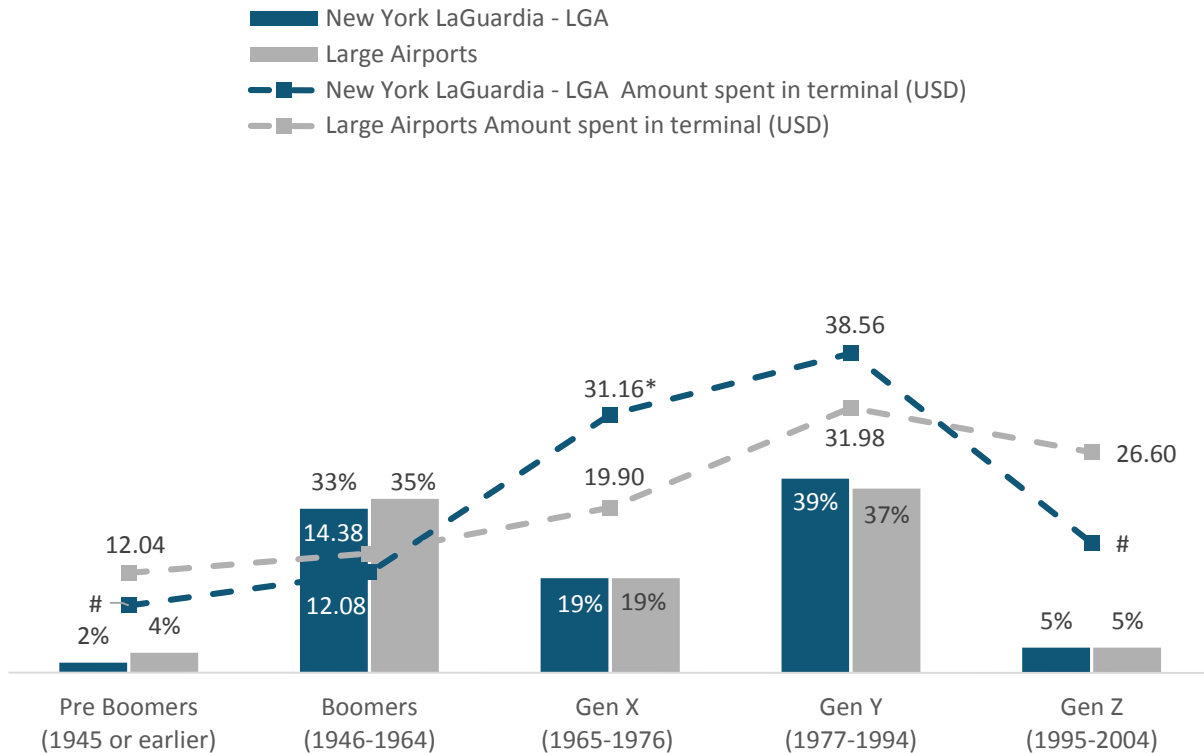
Overall Satisfaction and In Terminal Spending



Generational Spend

Gen Y passengers spend more at Large airports while Pre Boomer and Boomer passengers tend to spend less

Overall Satisfaction and In Terminal Spending



Note: *Small sample size (n=30-99). # Insufficient sample size (n<1-29).



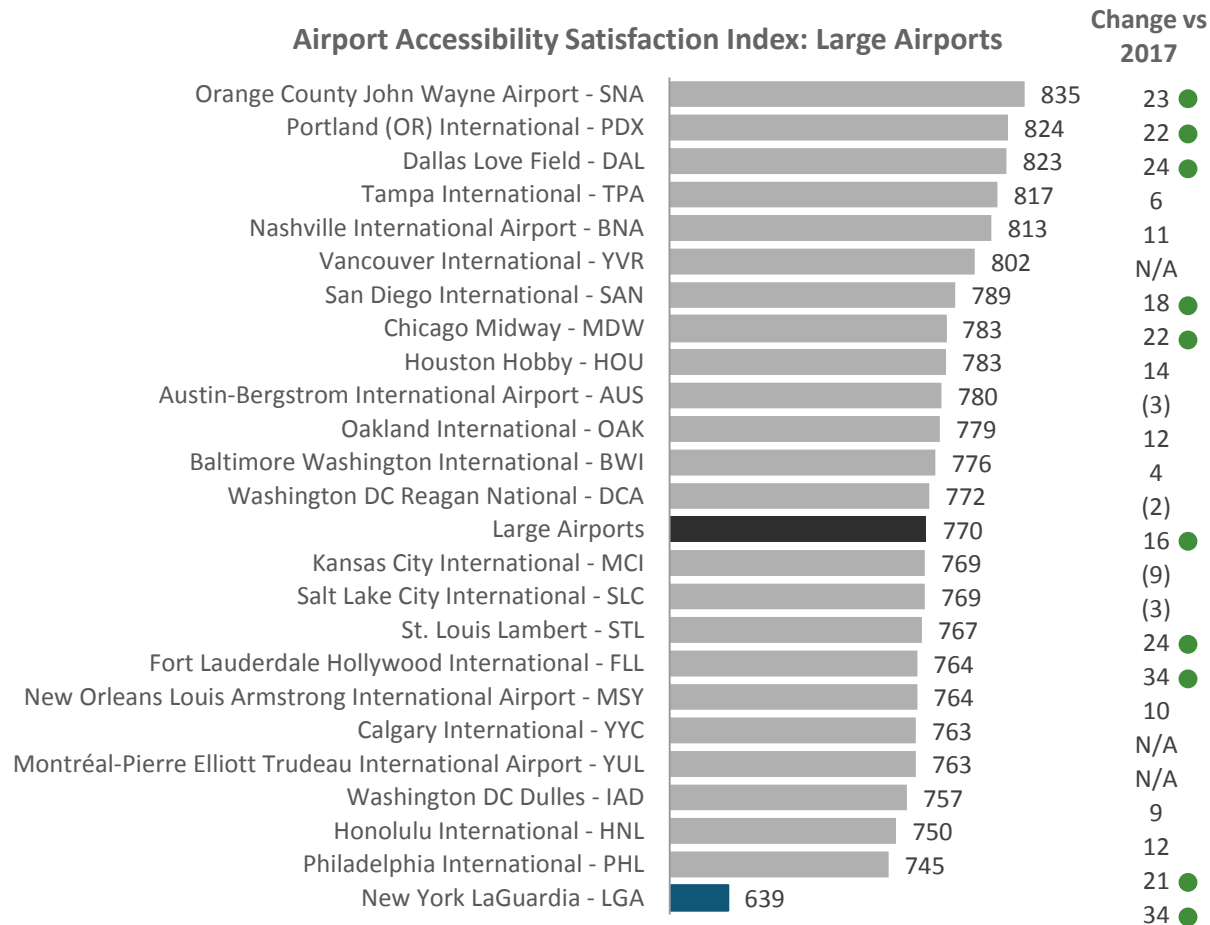
Airport Accessibility

Airport Accessibility Satisfaction

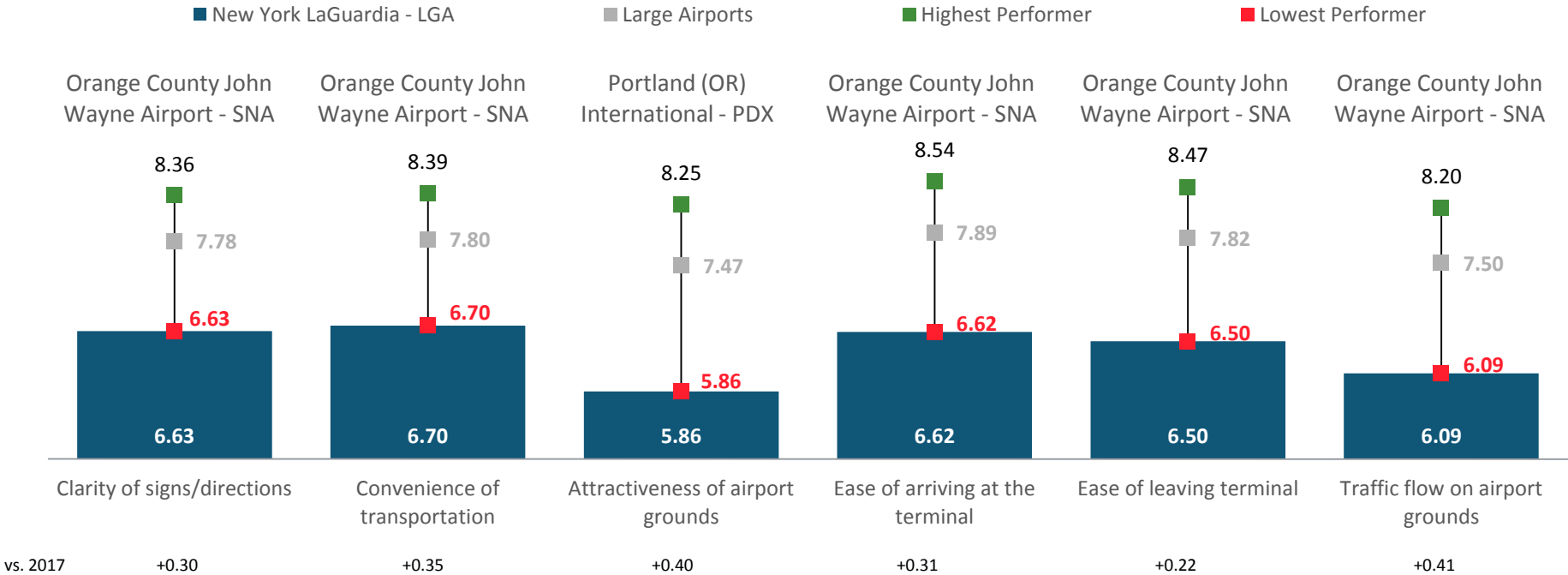
LGA ranks 24th in Airport Accessibility, and ranked from 21st in 2017

LGA improves a significant 34 points year over year while the Large airport segment makes a significant 16 point improvement.

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).

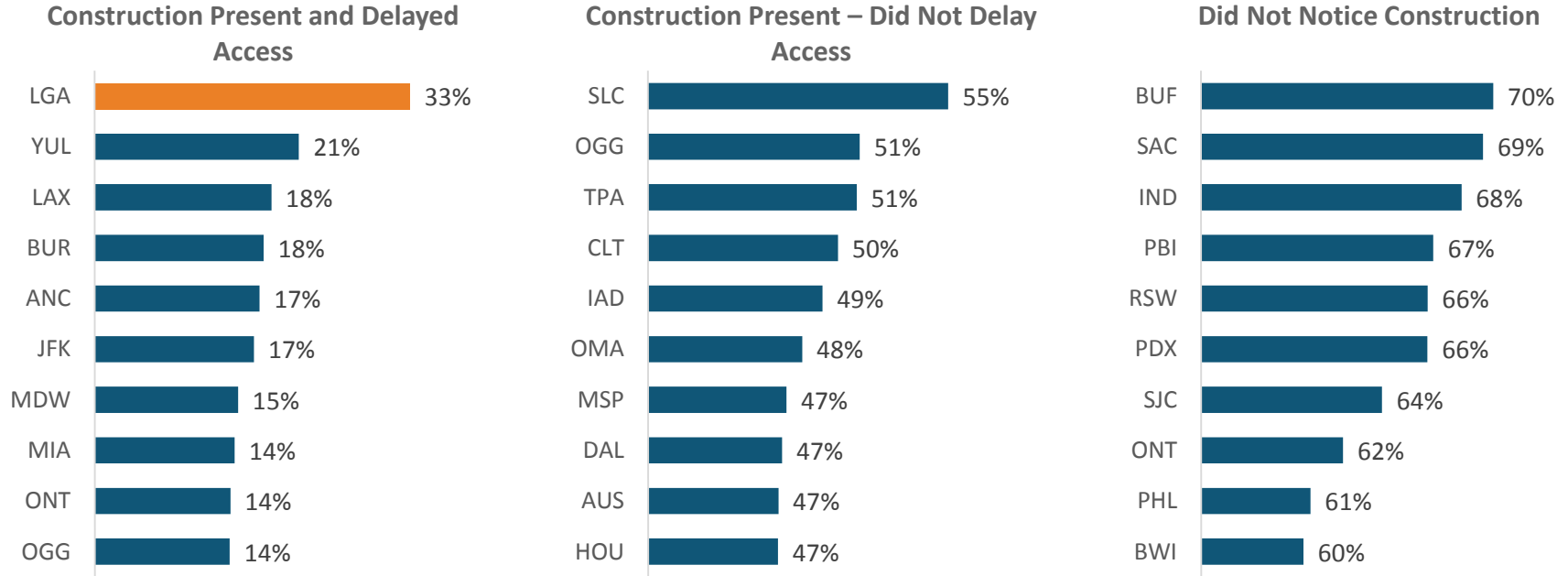


Attribute Performance



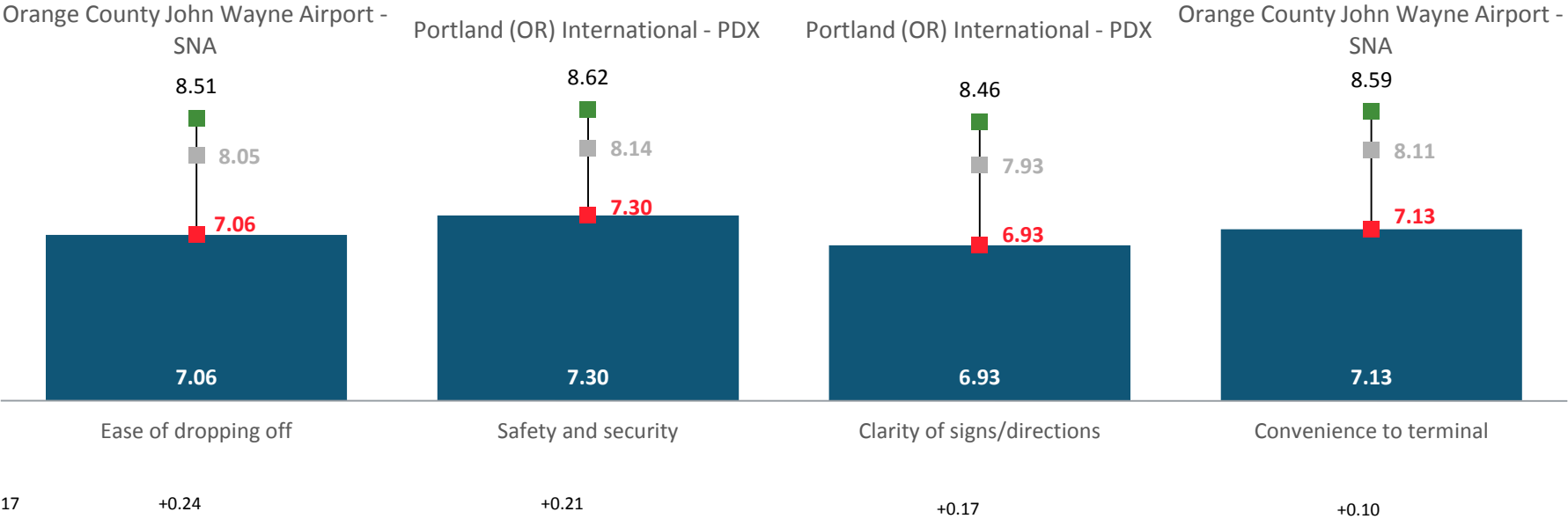
Airport Accessibility Satisfaction

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 LaGuardia - LGA ■ Large Airports ■ Highest Performer ■ Lowest Performer

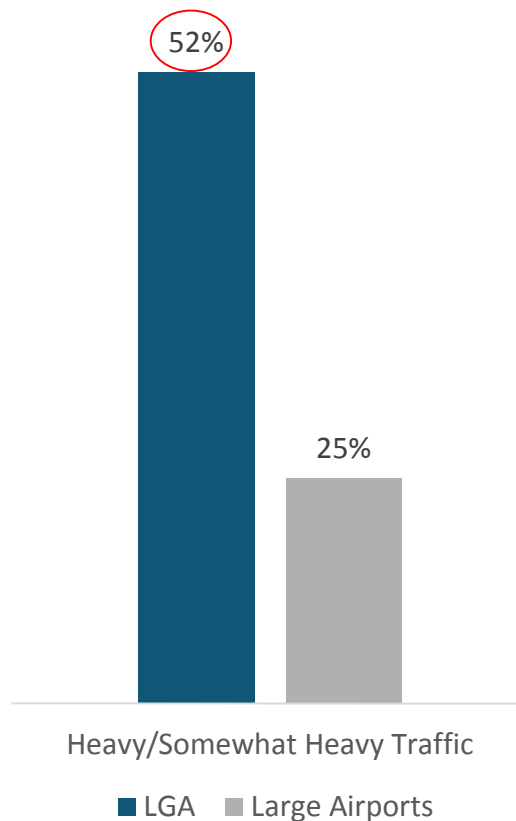


Airport Accessibility

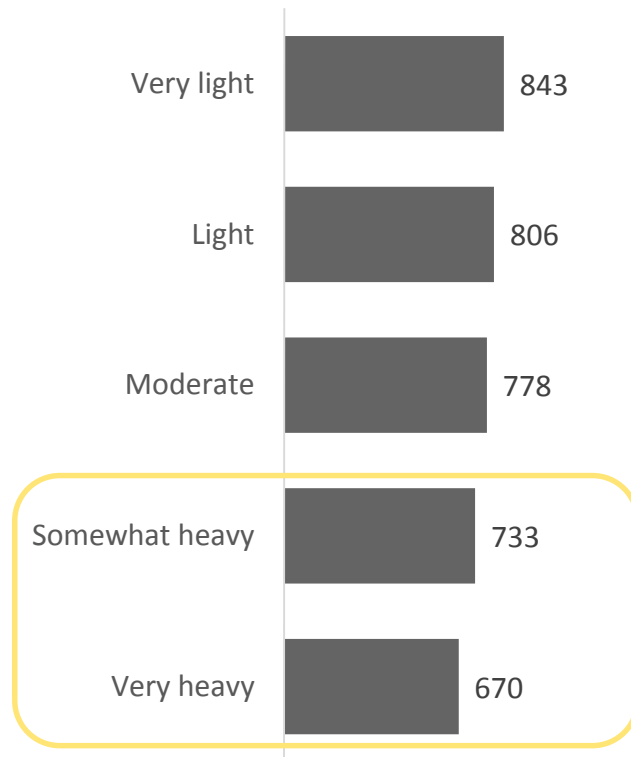
Traffic congestion impacts Airport Accessibility satisfaction

LGA traffic congestion is perceived as twice as heavy as the Large airport segment average

Traffic Congestion Getting to the Airport



Airport Accessibility Index by Traffic Congestion – Total Industry



Airport Accessibility

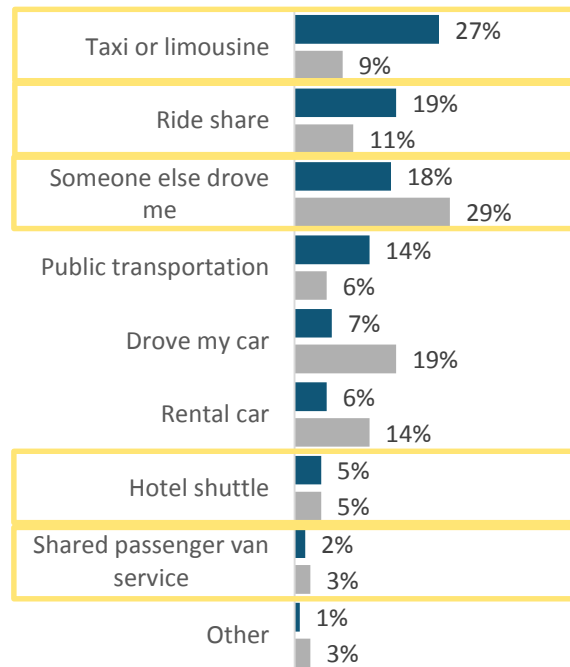
Airport Accessibility satisfaction is nearly 192 points higher at Large airports when passengers are able to easily find curb space

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 LaGuardia - LGA ■ Large Airports



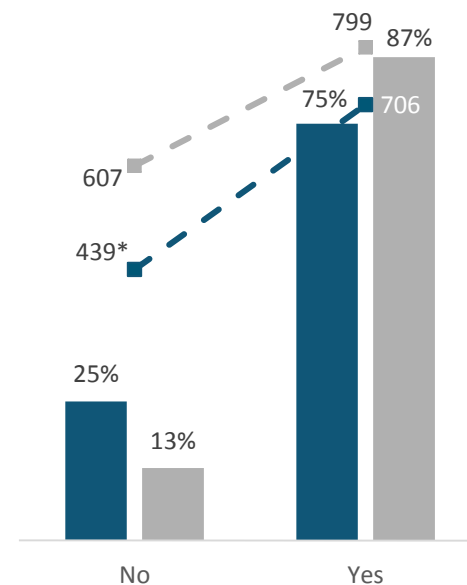
Was it Easy to Find Curb Space Upon Arrival?

■ New York LaGuardia - LGA

■ Large Airports

■ New York LaGuardia - LGA Airport Accessibility Index

■ Large Airports Airport Accessibility Index





Check-In/Baggage Check

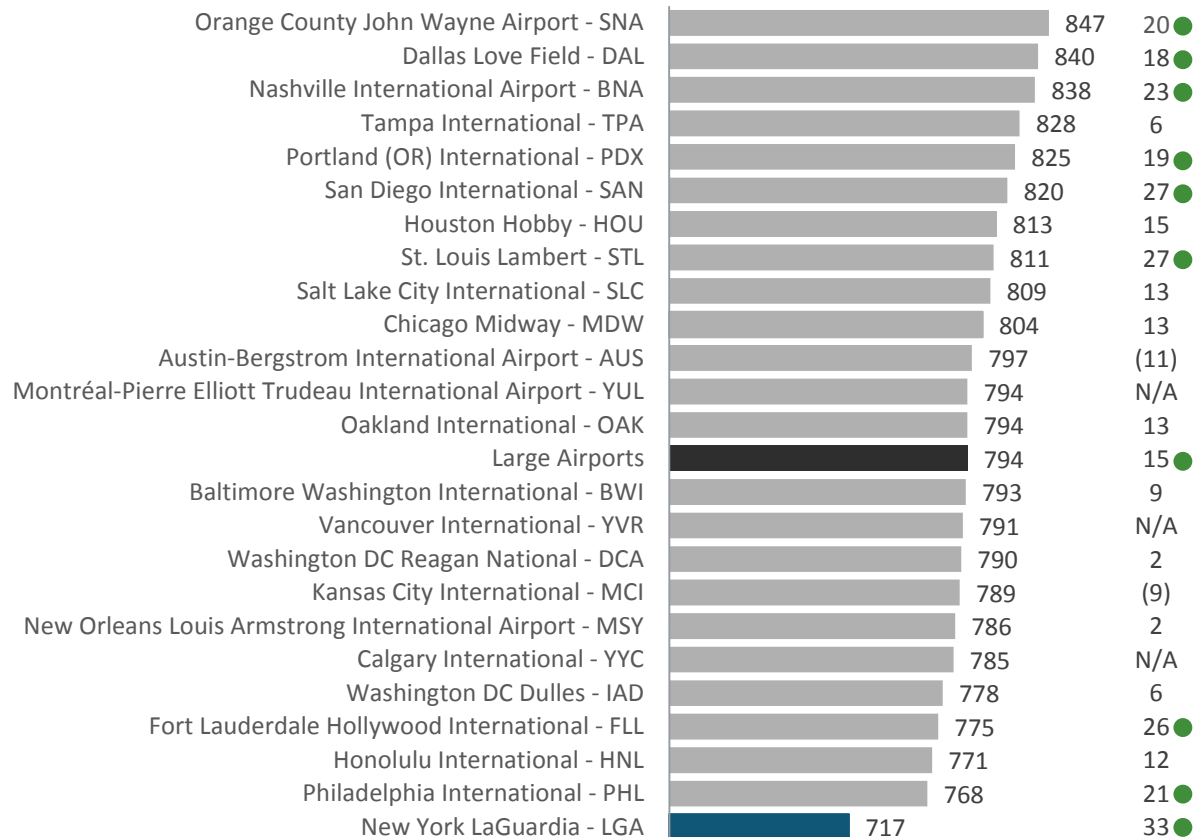
Check-In/Baggage Check Satisfaction

LGA ranks 24th for Check-In/Baggage, and ranked 21st in 2017

LGA improves a significant 33 points year over year while the Large airport segment makes a significant 15 point improvement.

Check-In/Baggage Check Satisfaction Index: Large Airports

Change vs
2017

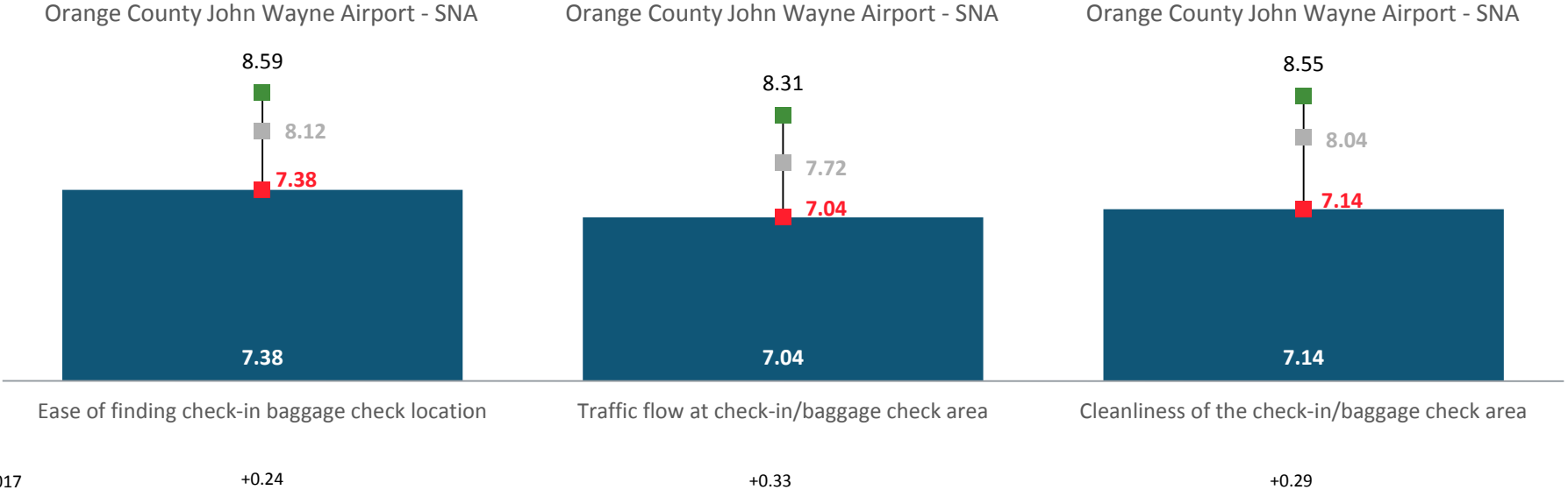


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Check-In/Baggage Check

Attribute Performance

■ New York LaGuardia - LGA ■ Large Airports ■ Highest Performer ■ Lowest Performer



Check-In/Baggage Check Satisfaction

LGA scores well when passengers use the main counter and scores lower when passengers use self check-in kiosk

This differs from other Large Airports where scores are highest when passengers use curbside and scores are low when passengers check-in online

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

New York LaGuardia - LGA	Main Counter	Self Check-in Kiosk	Curbside	Online
Ease of finding check-in/baggage check location	7.59	7.05	7.54*	7.45
Traffic flow at check-in	7.29	6.83	7.10*	6.97
Cleanliness of check-in area	7.33	6.96	7.34*	7.05

Large Airports	Main Counter	Self Check-in Kiosk	Curbside	Online
Ease of finding check-in/baggage check location	8.13	8.07	8.32	8.09
Traffic flow at check-in	7.72	7.68	8.00	7.65
Cleanliness of check-in area	8.12	8.00	8.15	7.96

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



Security Check

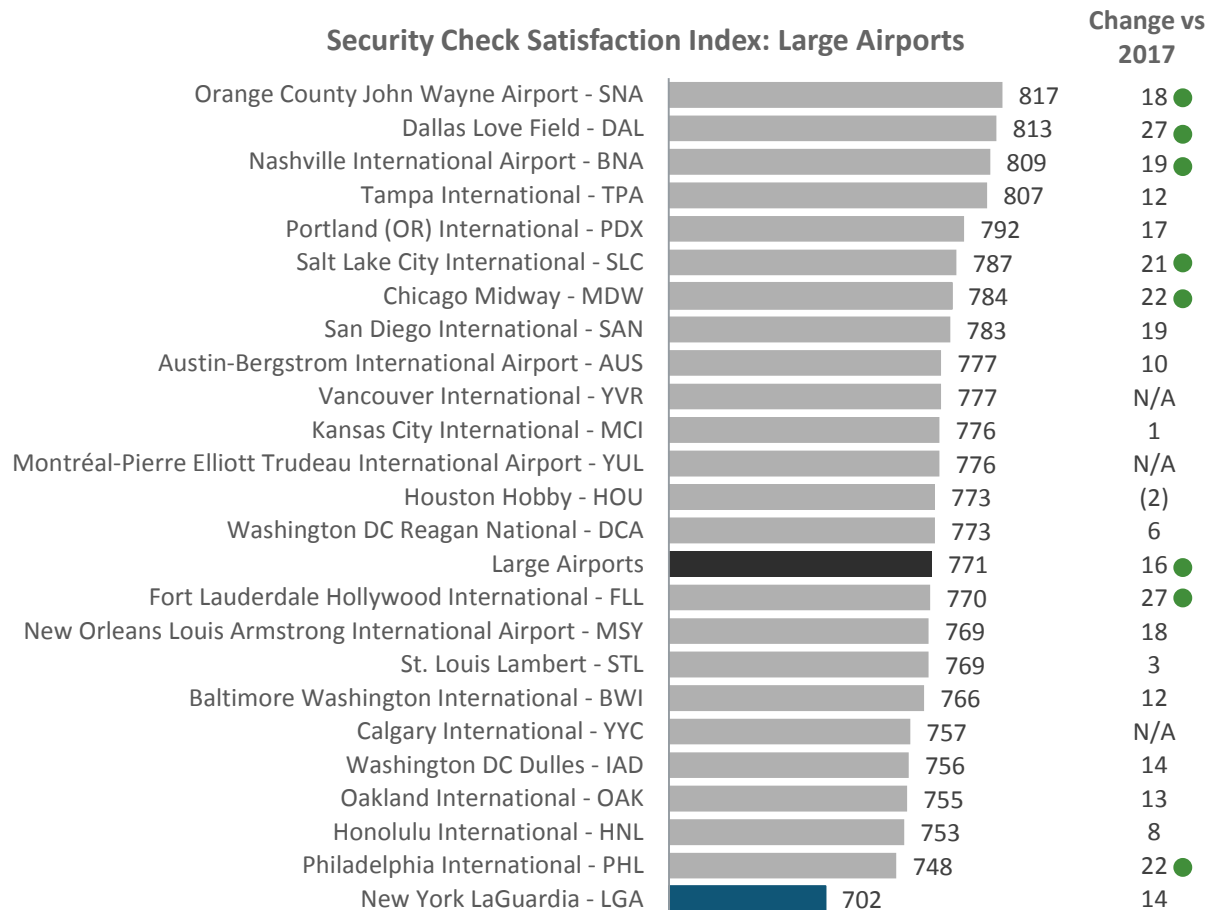
Security Check Satisfaction

LGA ranks 24th for Security Check and with a 14 point increase in satisfaction from 2017

The Large airport segment improves 16 points

Note: N/A – No relevant 2017 data available due to survey enhancements;
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Security Check Satisfaction Index: Large Airports



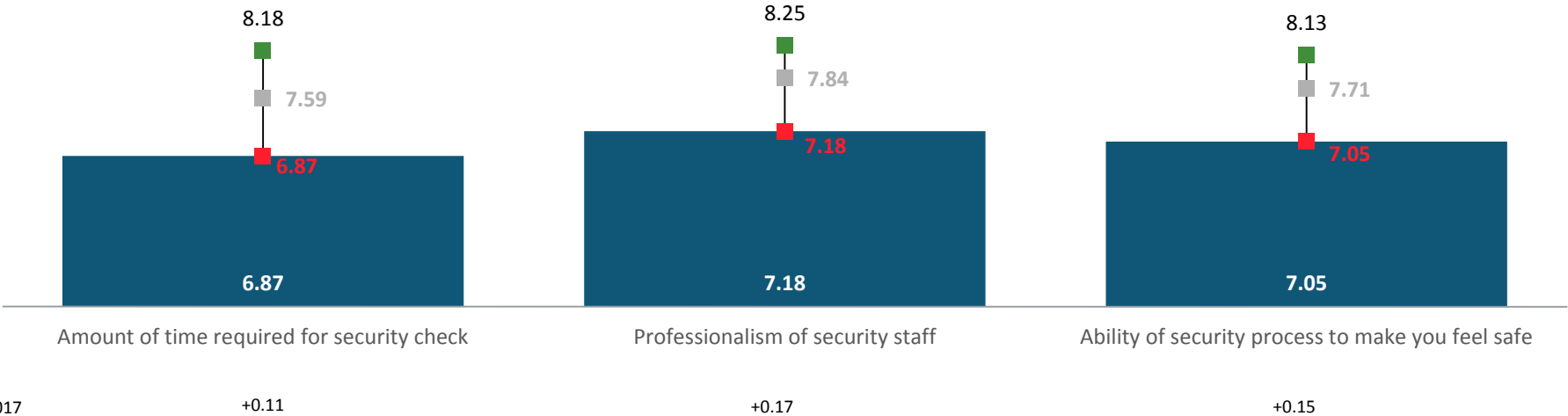
Attribute Performance

■ New York LaGuardia - LGA ■ Large Airports ■ Highest Performer ■ Lowest Performer

Orange County John Wayne Airport - SNA

Nashville International Airport - BNA

Dallas Love Field - DAL

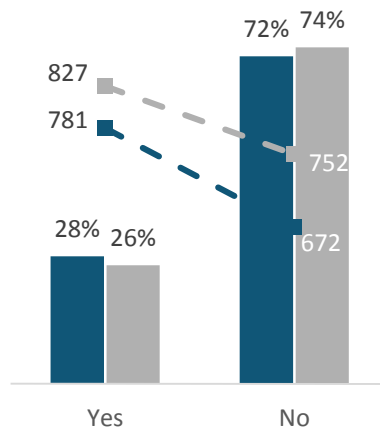


Security Check

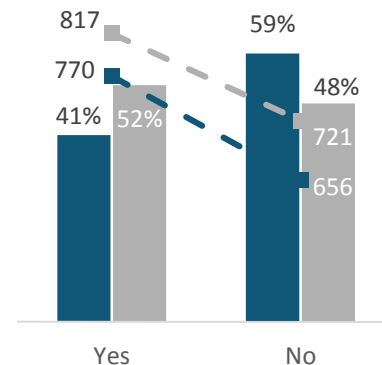
A speedy security check (10 minutes or less) and appropriate signage increase security check satisfaction

LGA performs slightly above the Large airport average for appropriate signage but well below average for speedy security check

Signage to Inform Security Wait Time by Security Check Satisfaction



Time to Get Through Security Less than 11 Minutes



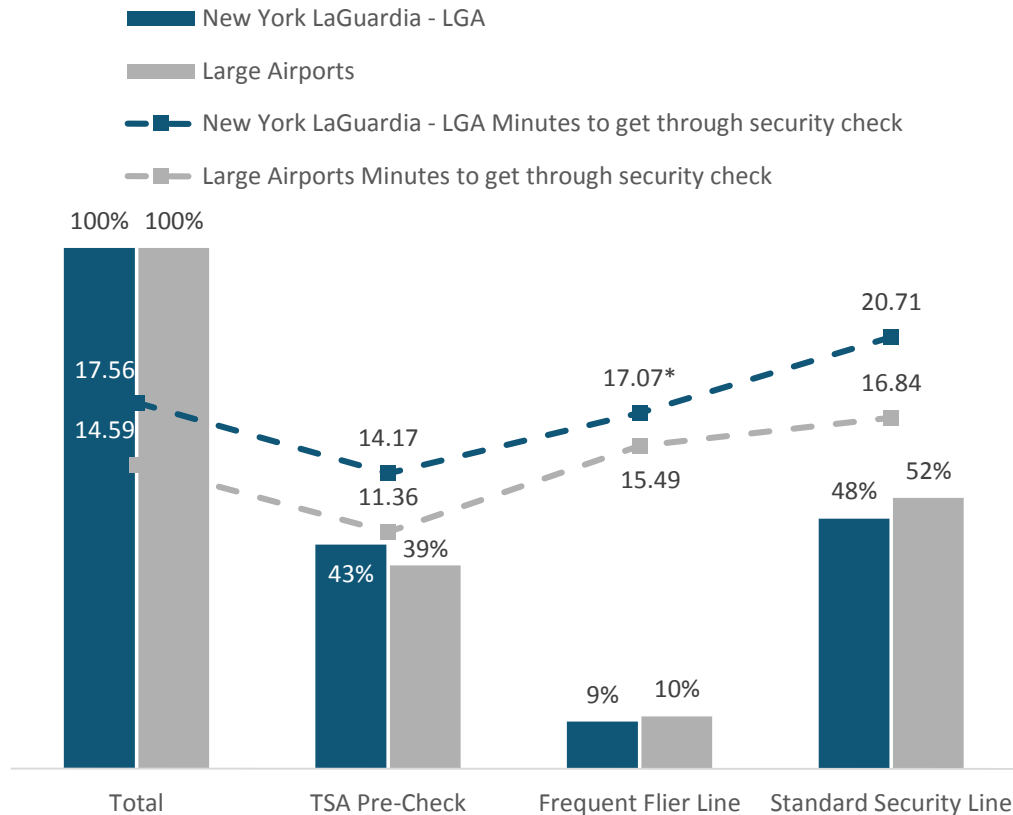
Security Check

Security wait times are almost three minutes slower at LGA compared to the Large airport segment

LGA has more TSA Pre-Check passengers than other Large airports

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

Security Line Type and Wait Time





Food, Beverage, & Retail Experience

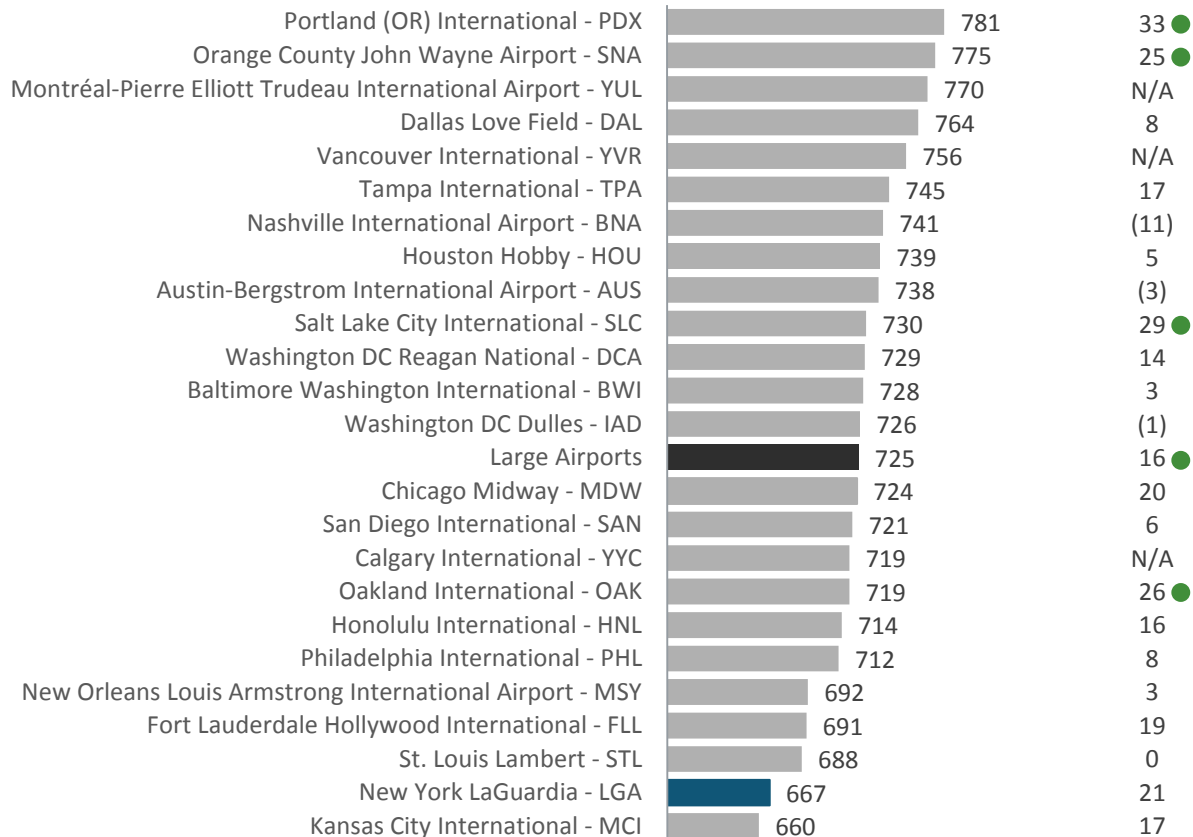
Food, Beverage, & Retail Satisfaction

LGA ranks 23rd in Food, Beverage, and Retail satisfaction.

LGA improved 21 points in Food, Beverage, and Retail Satisfaction; while the Large Airport segment improved a significant 16 points year over year.

Food, Beverage, & Retail Satisfaction Index: Large Airports

Change vs
2017



Note: N/A – No relevant 2017 data available due to survey enhancements;
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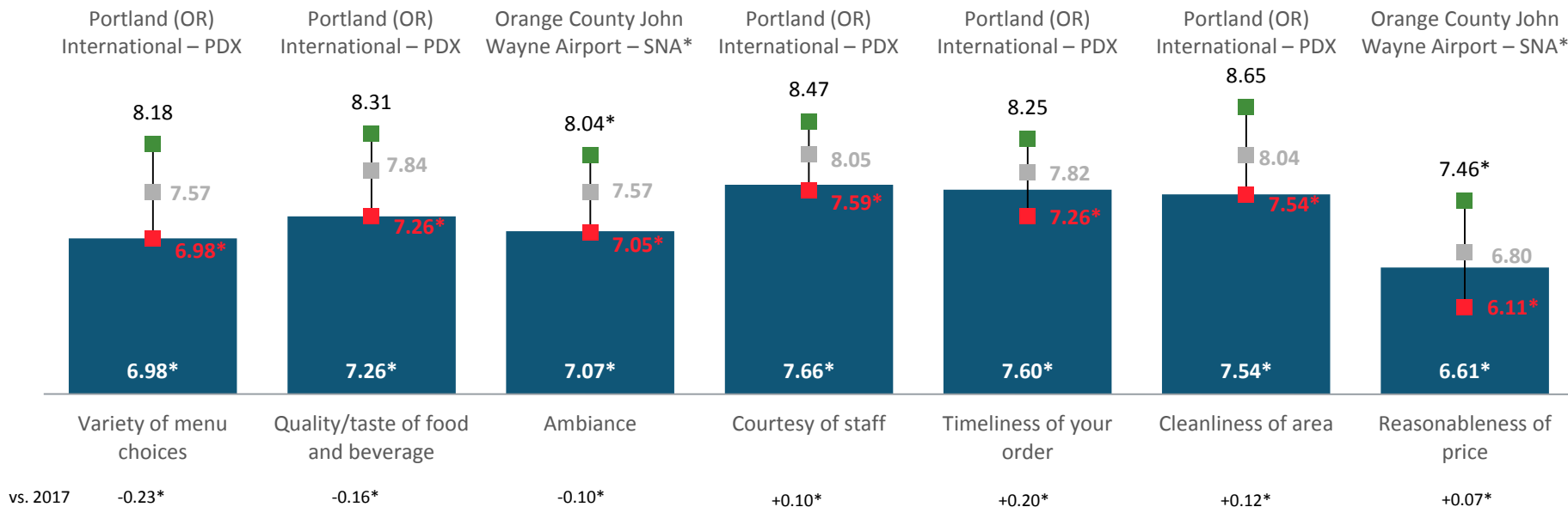
Attribute Performance – Restaurant/Bar

■ New York LaGuardia - LGA

■ Large Airports

■ Highest Performer

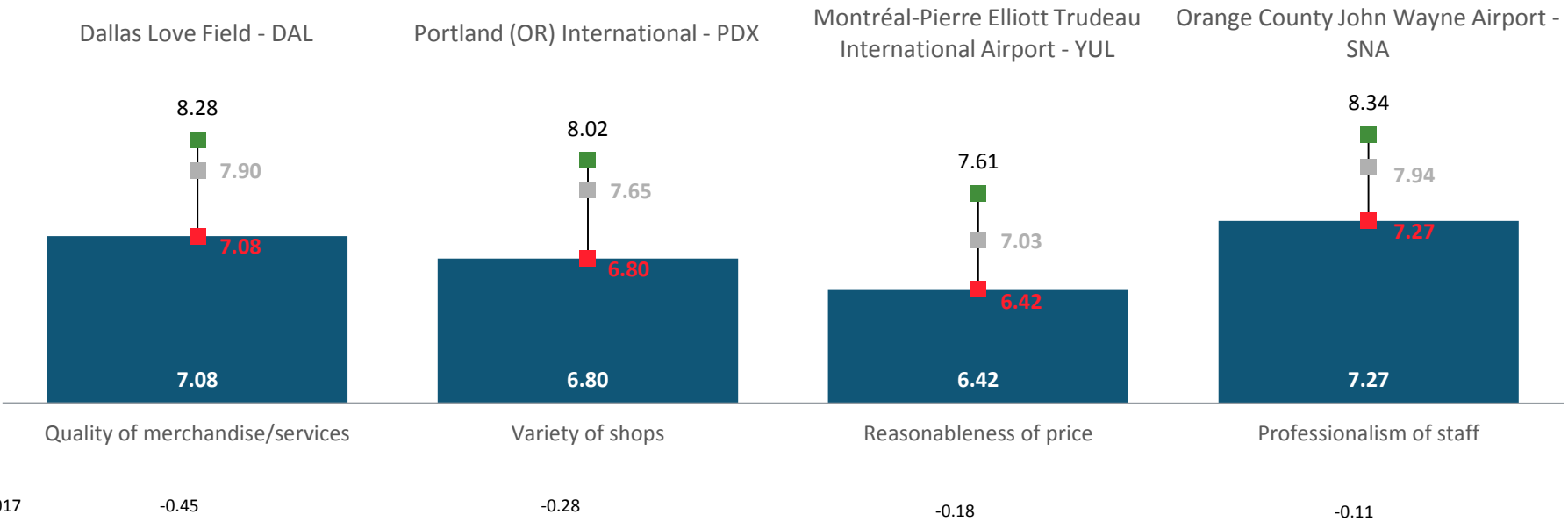
■ Lowest Performer



Note: Based on those who purchased food/beverage and/or merchandise/services while at the airport; *small sample size (n=30-99).

Attribute Performance – Retail Service

■ New York LaGuardia - LGA ■ Large Airports ■ Highest Performer ■ Lowest Performer



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

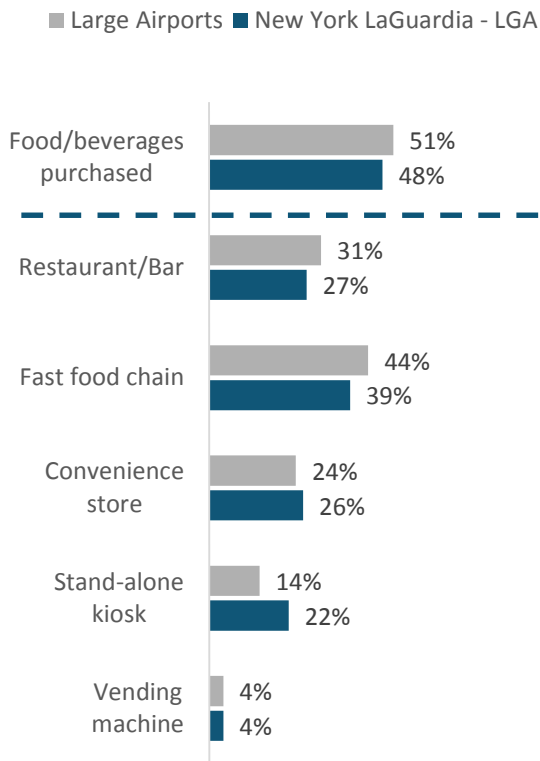
Food, Beverage and Retail

13% of LGA passengers who did not purchase F&B stated that they didn't like the choices available

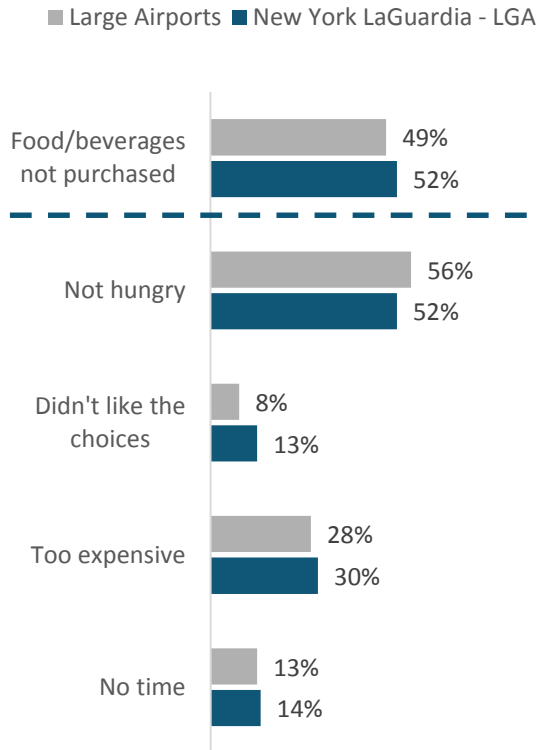
The majority of passengers that purchase F&B at LGA do so at a fast food chain.

Passengers use stand-alone kiosks at LGA more frequently than other Large airports

Purchase Food and/or Beverages



Reason for Not Purchasing

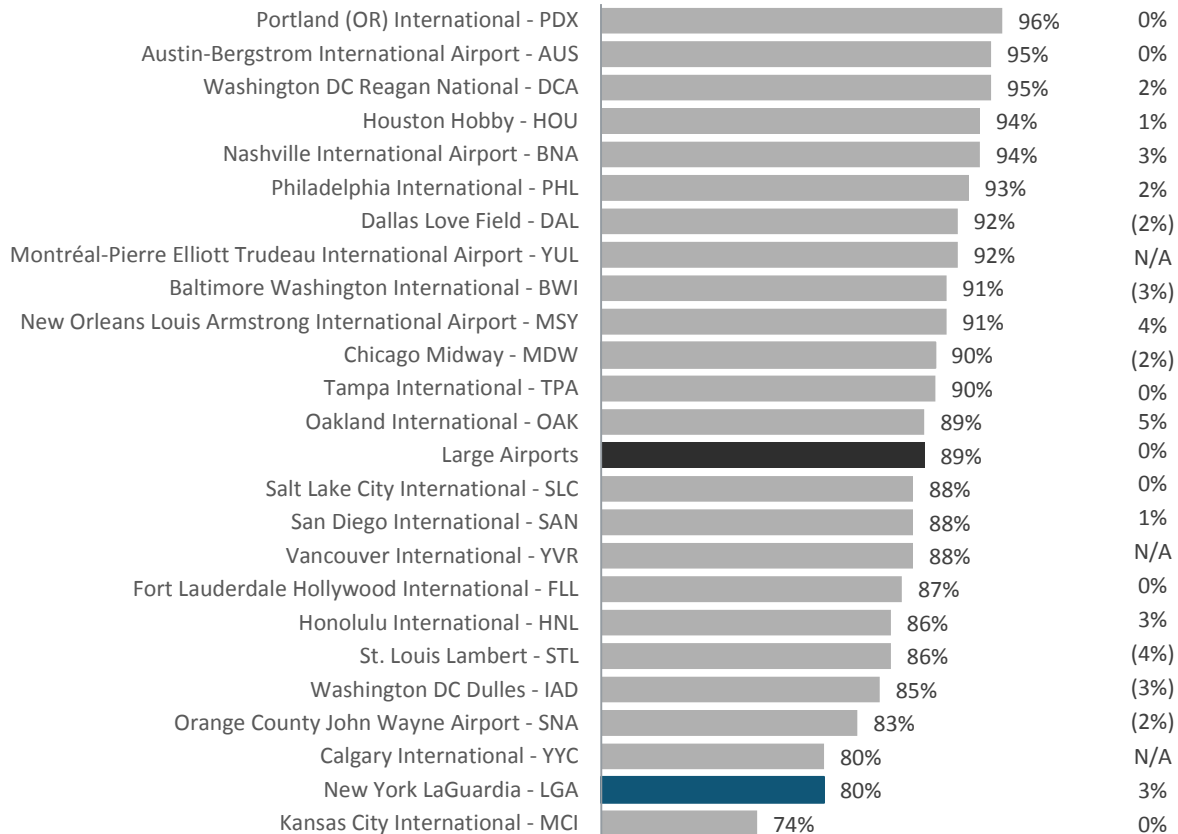


Food, Beverage, & Retail Satisfaction

1 in 5 LGA passengers are not able to find local food and beverage within the airport

Availability of Food & Beverage with Local Flavor

Change vs
2017



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

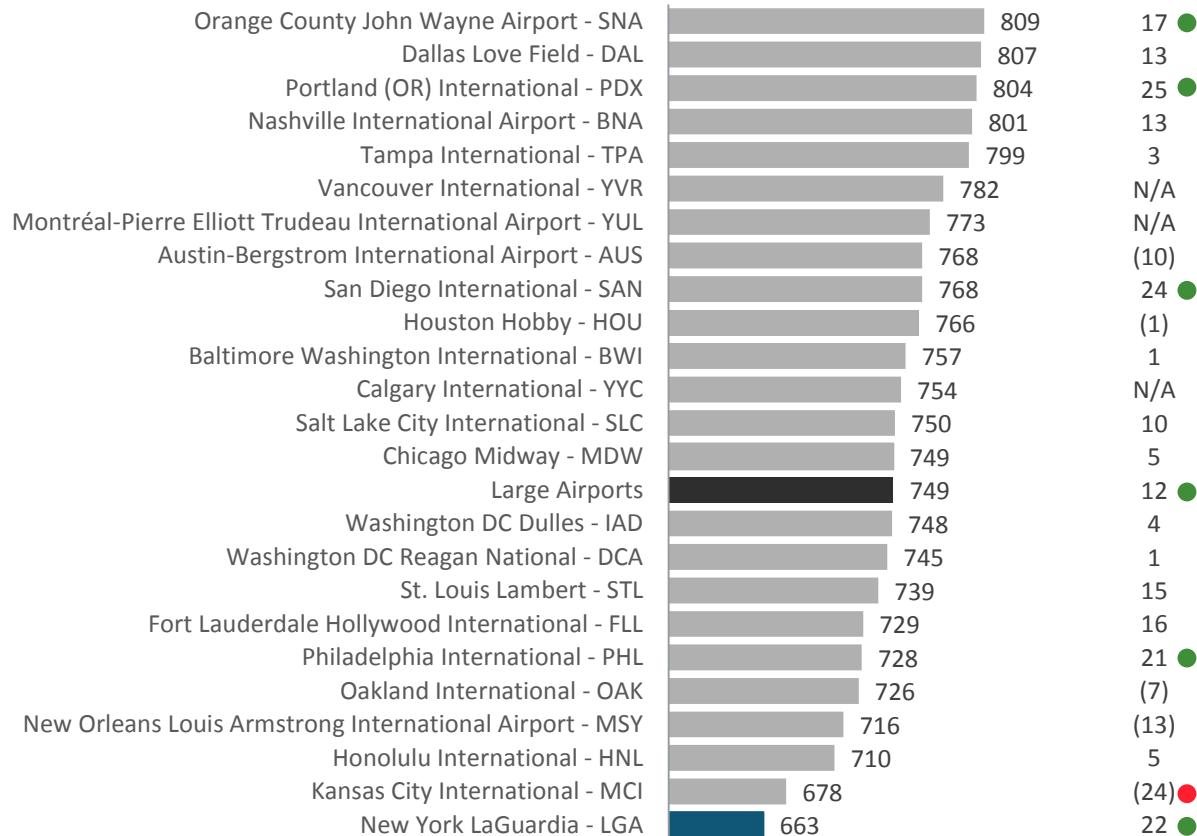
Terminal Facilities Satisfaction

LGA ranks 24th for Terminal Facilities

LGA improves a significant 22 points year over year while the Large airport segment makes a significant 12 point improvement.

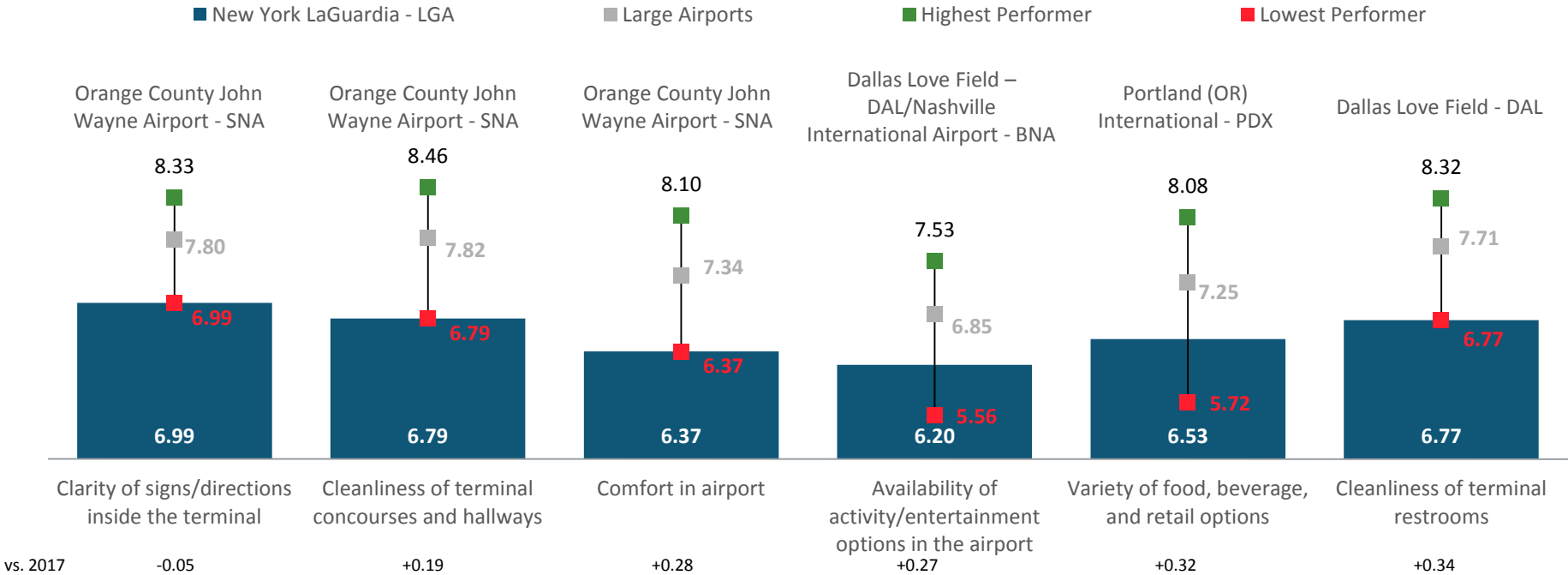
Terminal Facilities Satisfaction Index: Large Airports

Change vs
2017



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

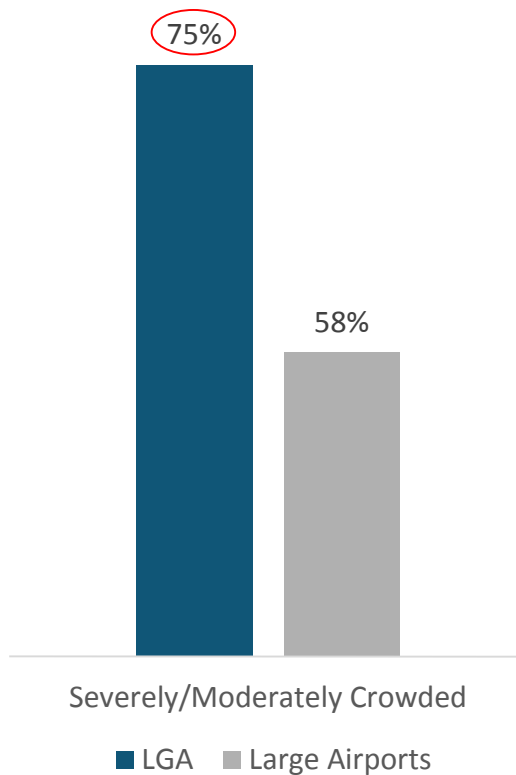


Terminal Facilities

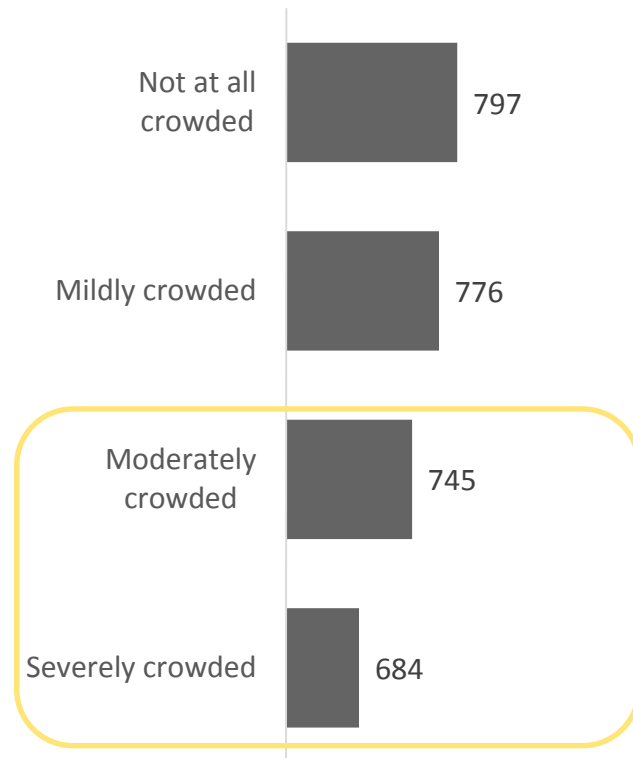
Terminal Facilities satisfaction declines when terminals are perceived as crowded

LGA's airport terminal is much more crowded than the Large airport segment average

Crowd Within the Airport Terminal



Terminal Facilities Index by Crowding – Total Industry



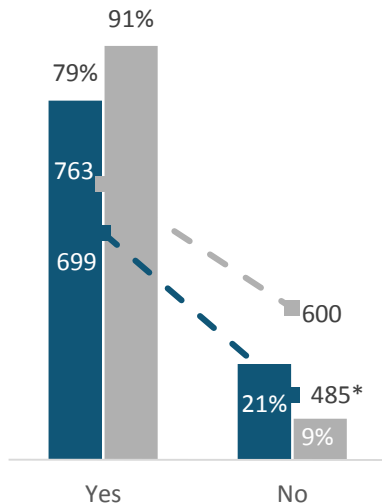
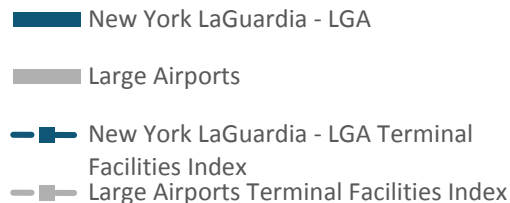
Terminal Facilities

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

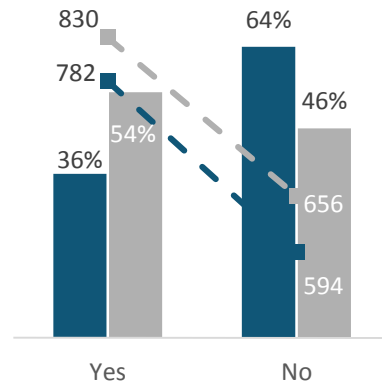
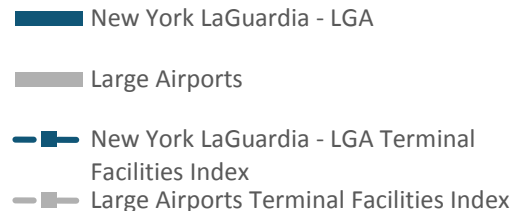
Restroom cleanliness and having clear and adequate signage are two of the most impactful KPIs in the 2018 Airport Satisfaction Study.

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

Restroom Cleanliness



Signage Adequate and Easy to Understand

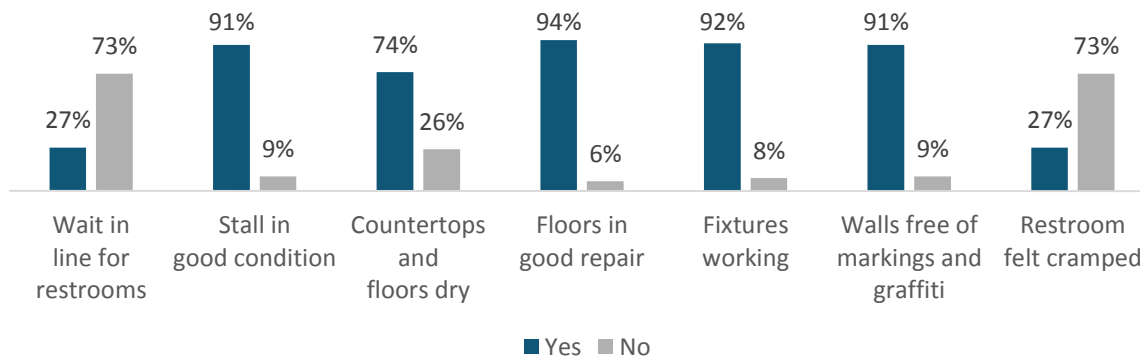


Terminal Facilities

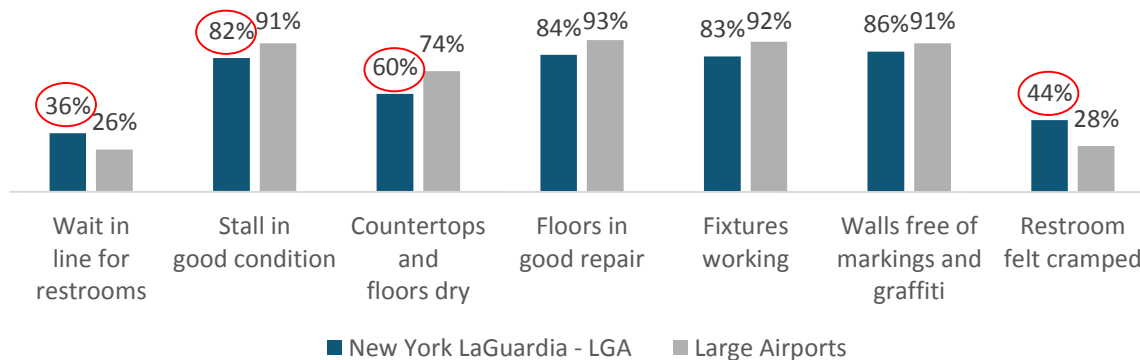
Restroom condition impacts perceptions of cleanliness substantially

The biggest gaps between the Large airport segment and LGA are “Countertops and floors dry” and “Restroom felt cramped”

Restroom Clean % Yes by Restroom Components – Total Industry



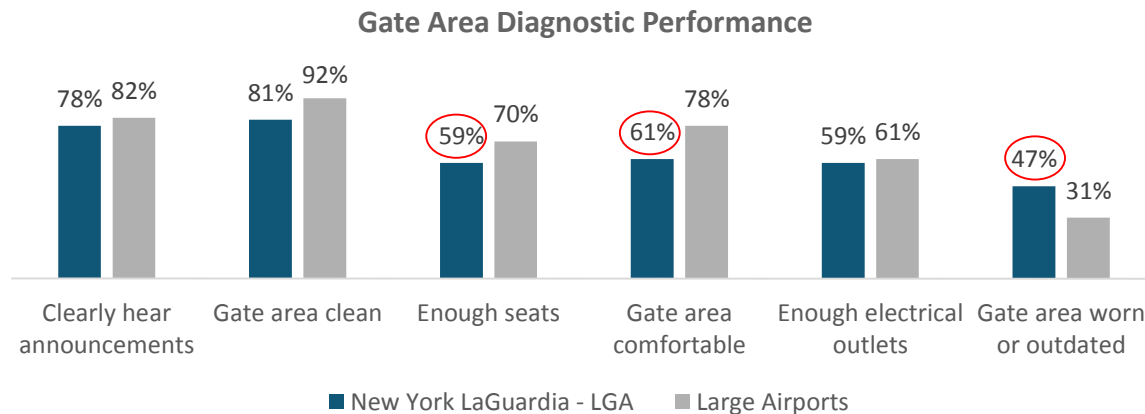
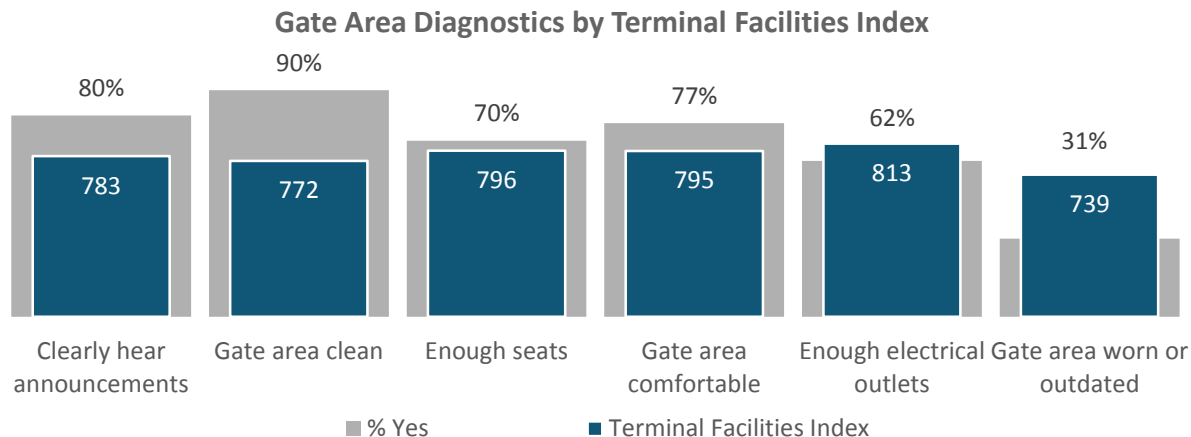
Restroom Components - % Yes



Terminal Facilities

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

LGA is in line with the Large airport average for enough electrical outlets but falls short in gate area comfort



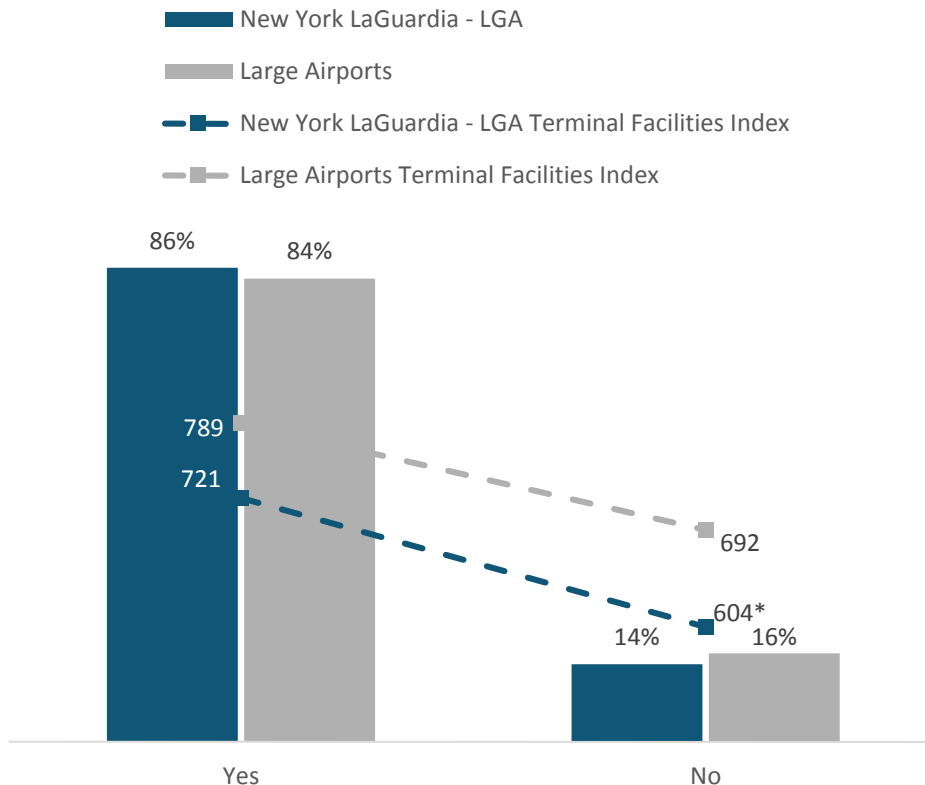
Terminal Facilities

Satisfaction is 97 points higher when Wi-Fi is faster or as fast as expected for the Large airport segment

86% of LGA passengers state the Wi-Fi was faster than or as fast as expected, 84% of Large airport passengers state the same

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

Wi-Fi Connection Faster Than or As Expected





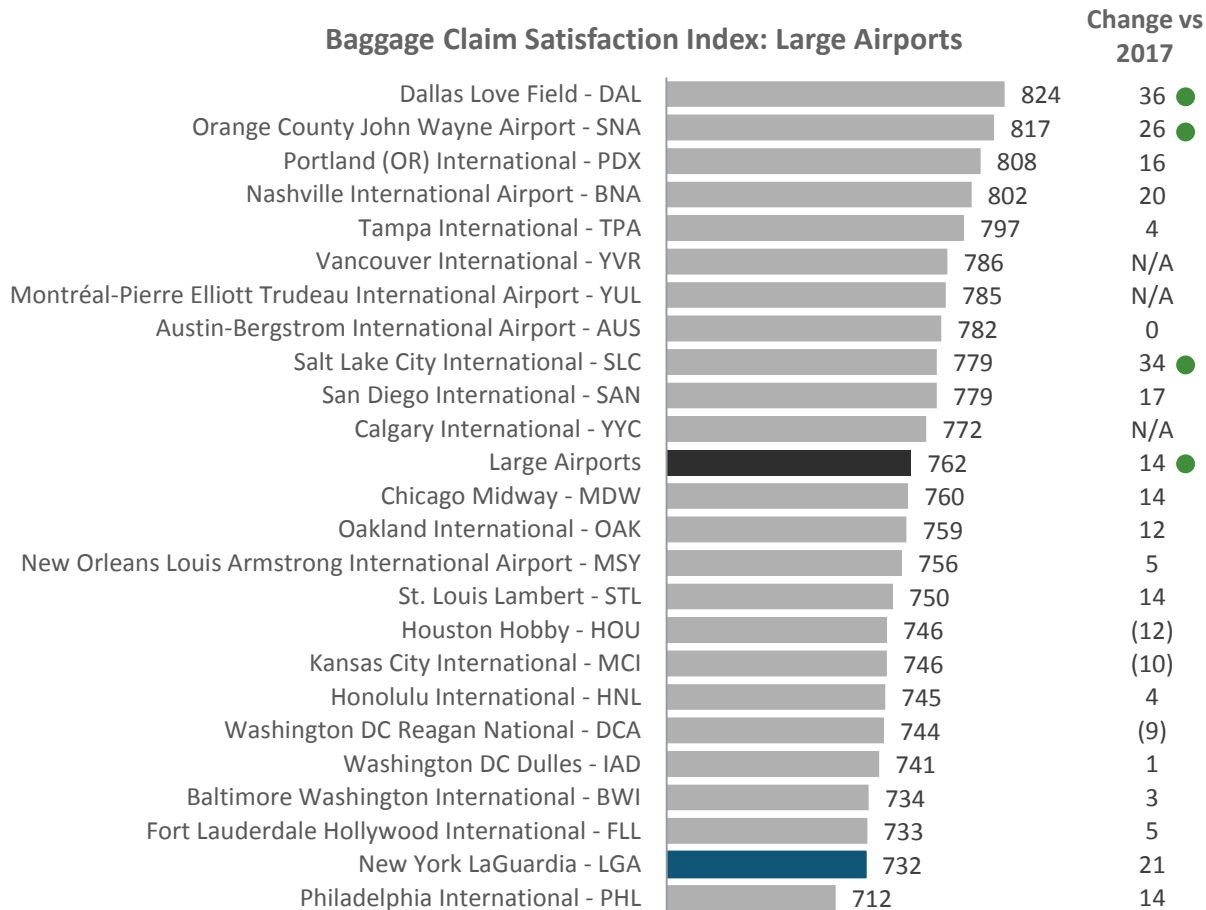
Baggage Claim

Baggage Claim Satisfaction

LGA ranks 23rd for Baggage Claim

LGA improves 21 points year over year while the Large airport segment makes a significant 14 point improvement.

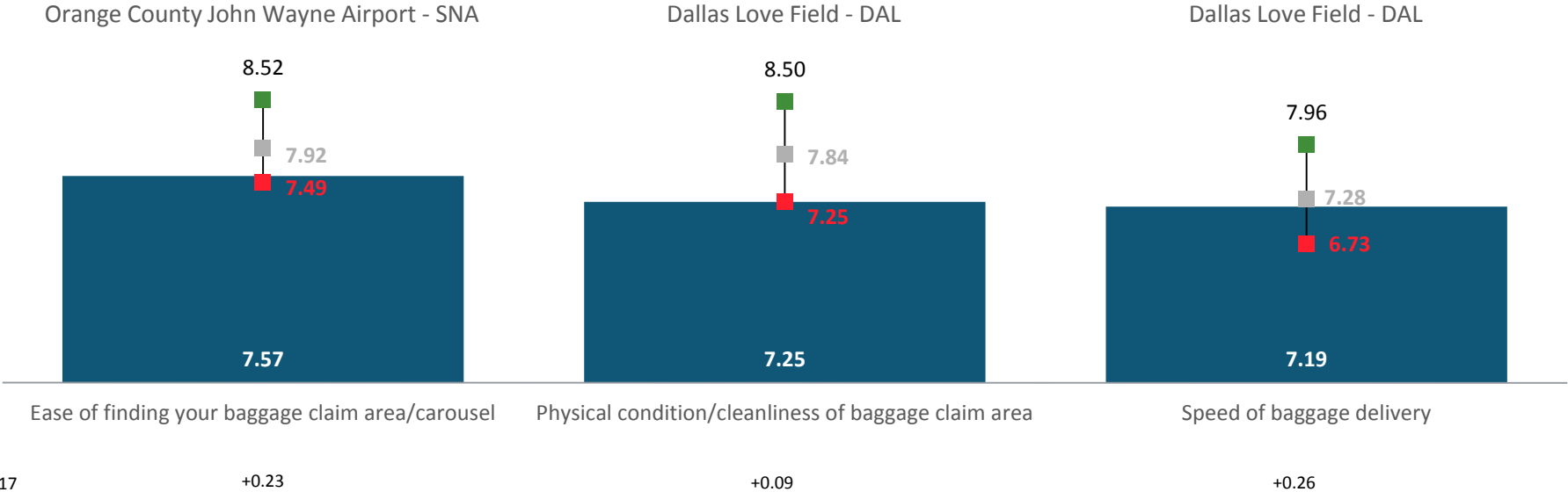
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Baggage Claim

Attribute Performance

■ New York LaGuardia - LGA ■ Large Airports ■ Highest Performer ■ Lowest Performer



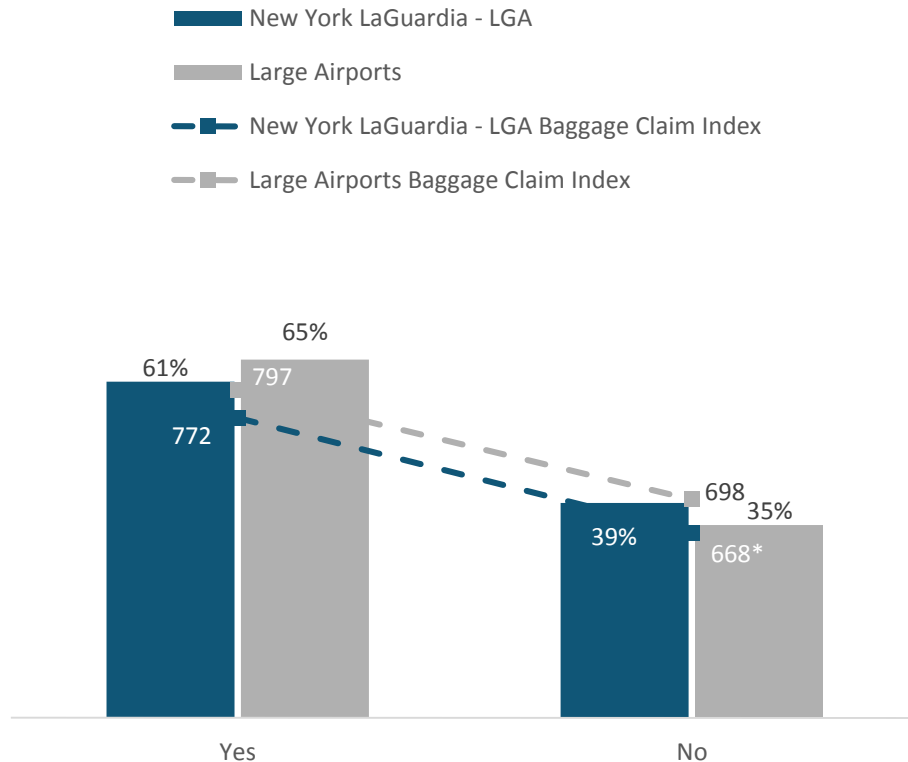
Baggage Claim

Receiving baggage in 15 minutes or less, leads to overall satisfaction that is 99 points above those receiving baggage in 16 minutes or more for the Large airport segment

61% of LGA passengers wait less than 16 minutes or longer for their baggage

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

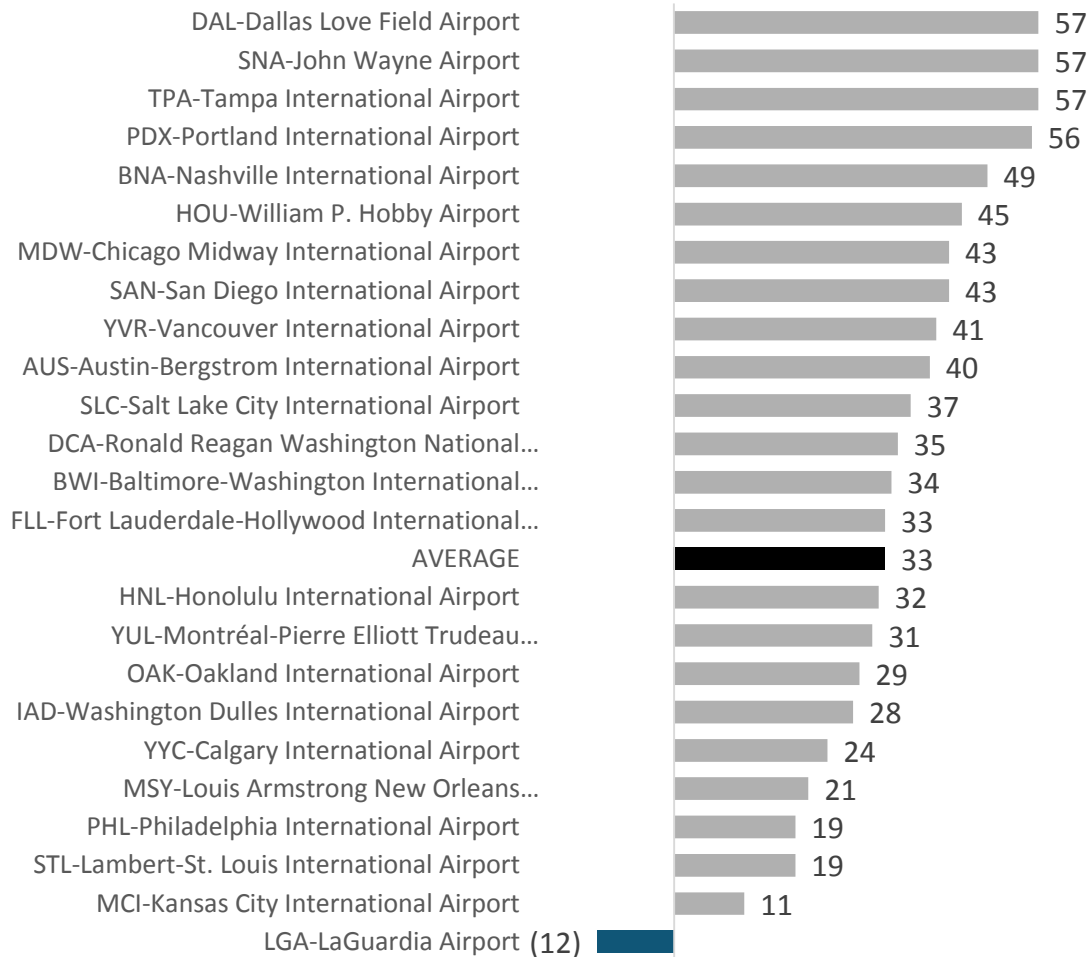
Waited Less than 16 Minutes in Baggage Claim Area for Baggage Claim





NPS Scores – Large Airport Segment

LGA lags behind the large airport segment in NPS



Beyond Measure

Michael Taylor | Michael.Taylor@jdpa.com | 203.856.8039

For more information, please visit:

jdpower.com

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