



Airport Terminal-Level Performance Report

Second Quarter 2019

Summary Results for Aviation Management

July 29, 2019

A Customer Experience Presentation

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.

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	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.	
Finding Your Way	Ease of finding your way through airport		
	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.



Terminal-level Satisfaction Performance

JFK Airport Performance – By Terminal

- ➔ **Terminal 1:** Overall passenger satisfaction (3.65) in Q2 2019 improved significantly year-over-year (YOY—Q2 2018) and among those traveling for personal (leisure or other) reasons (3.68). Satisfaction with some terminal elements also improved significantly YOY: TSA courtesy (3.74), safe/secure feeling (4.05), airport staff courtesy (3.97), eating facilities (3.39), eating facilities value for the money – VFM (2.82, also the lowest scoring terminal element), shopping facilities (3.62), airport ambience (3.53), Internet/Wi-Fi access (3.31, also improved significantly since last quarter – Q1 2019, as did restroom cleanliness – 3.51). Walking distance was the highest scoring terminal element in Q2 2019.
- ➔ **Terminal 2:** Passenger satisfaction declined significantly overall (3.52) and among leisure travelers (3.38) since last quarter (QTQ)-- Q1 2019. A number of terminal elements also declined significantly QTQ: security ID/ticket check wait-time (3.69), thoroughness (3.71), safe/secure feeling (3.93), TSA courtesy (3.52, also down significantly YOY, as was security check wait-time -- 3.49), restroom availability (3.65), comfort at the gate (3.50), terminal cleanliness (3.62) and airport ambience (3.31). Terminal 2 satisfaction remained stable YOY overall and on all terminal elements. Parking facilities VFM (2.71) was the lowest scoring element in Q2 2019, while check-in staff efficiency (4.06) was, once again, the highest scoring.
- ➔ **Terminal 4:** Compared to YOY, passenger satisfaction improved significantly overall (3.91) and among leisure (3.93) travelers as well as on Internet/Wi-Fi access (3.77), restroom cleanliness (3.95), comfort at the gate (3.84) and airport ambience (3.91). However, overall passenger satisfaction (3.91) declined significantly QTQ, as did satisfaction among those traveling for personal reasons (3.94) and terminal elements including: parking facilities VFM (3.13), all three check-in elements, 5 of 6 security check elements (except safe/secure feeling – 4.10), eating facilities VFM (2.97, also the lowest scoring terminal element in Q2 2019), ATMs/MExchanges (3.67), shopping facilities (3.82) and their respective VFM (3.15), business lounges (3.69), arrivals bag delivery speed (3.70), Passport Control (3.74) and Customs inspection (3.63). Terminal cleanliness (4.13) scored highest in Q2 2019.

JFK Airport Performance – By Terminal (Cont'd)

- ➔ **Terminal 5:** Most terminal elements remained steady YOY and QTQ. The few exceptions of significant improvement YOY are shopping facilities VFM (3.23), Internet/Wi-Fi (4.07), business lounges (3.65), walking distance (3.95) and connections (4.29 also improved significantly QTQ). FIDS (4.35) scored highest in Q2 2019; parking facilities VFM (3.13) scored lowest.
- ➔ **Terminal 7:** Passenger satisfaction improved significantly overall (3.77) and among leisure travelers (3.79) YOY and also on many terminal elements: ease of finding way (4.08), FIDS (4.07), walking distance (4.16, also the highest scoring element in Q2 2019), eating facilities (3.28), shopping facilities (3.34), Internet/Wi-Fi access (3.95), restroom cleanliness (3.70) and availability (3.89), terminal cleanliness (3.93), comfort at the gate (3.68) and airport ambience (3.61). Some terminal elements declined significantly QTQ, such as: check-in wait-time (3.91), and staff efficiency (4.03) and all security check/TSA elements, except thoroughness (3.89 -- which remained steady). Eating facilities VFM (2.68) was the lowest scoring terminal element in Q2 2019.
- ➔ **Terminal 8:** Overall passenger satisfaction remained steady YOY and QTQ. Internet/Wi-Fi access(4.01) improved significantly YOY, while airport ambience (3.91) and FIDS (4.07) declined significantly over the same time period – the latter element also declined QTQ. Passenger satisfaction with each of the following elements also declined significantly QTQ: security ID/ticket check staff courtesy (3.84), TSA courtesy (3.70) and thoroughness (3.90), eating facilities (3.52), shopping facilities (3.58), and arrivals passport control inspection (3.83). Eating facilities VFM (2.99) scored lowest in Q2 2019; ease of finding way and terminal cleanliness (both 4.18) scored highest.

JFK Terminal Performance

		<u>T1</u>	<u>T2</u>	<u>T4</u>	<u>T5</u>	<u>T7</u>	<u>T8</u>
Overall Satisfaction	Overall Satisfaction	3.65 H2	3.52 L1	3.91 L1/H2	4.08	3.77 H2	3.98
	Business	3.40	3.71	3.75	3.92	3.60	3.84
	Leisure	3.64	3.38 L1	3.93 H2	4.12	3.79 H2	4.00
	Other*	3.82	3.90	4.00	4.06	3.83	4.02
	Leisure & Other	3.68 H2	3.46 L1	3.94 L1/H2	4.10	3.80 H2	4.01
Access	Ground transportation	3.68	3.61	3.73	3.87	3.76	3.83
	Parking	4.00	3.00	3.68	3.61	3.74	3.85
	VFM: Parking facilities	3.41	2.71	3.13 L1	3.13	3.13	3.43
	Baggage carts/trolleys	3.68	3.65	3.76	3.77	3.75	3.82
Check-in	Check-in waiting time	3.79	3.79	3.85 L1	3.98	3.91 L1	4.10
	Efficiency of staff	4.02	4.06	3.96 L1	4.10	4.03 L1	4.17
	Courtesy of check-in staff	4.03	3.96	3.97 L1	4.05	3.97	4.08
Security ID Check	Inspection waiting time	3.78	3.69 L1	3.73 L1	3.95	3.72 L1	3.98
	Courtesy of inspection staff	3.79	3.77	3.78 L1	3.98	3.71 L1	3.84 L1
Security	Courtesy of security staff	3.74 H2	3.52 L1/2	3.71 L1	3.89	3.48 L1	3.70 L1
	Thoroughness	3.88	3.71 L1	3.89 L1	4.00	3.89	3.90 L1
	Security waiting time	3.55	3.49 L2	3.61 L1	3.76	3.49 L1	3.73
	Safe/secure feeling	4.05 H2	3.93 L1	4.10	4.14	4.04 L1	4.16
Finding Way	Ease of finding way	4.05	3.89	4.02 L1	4.30	4.08 H2	4.18
	Flight info screens	3.92	3.90	4.03 L1	4.35	4.07 H2	4.07 L1/2
	Walking distance	4.06	3.85	3.40 L1	3.95 H2	4.16 H2	3.73
	Ease of connections	3.66	3.31	3.73	4.29 L1/H2	3.37	3.95
Airport Facilities	Courtesy of airport staff	3.97 H2	3.84	4.02	4.11	3.92	4.05
	Eating facilities	3.39 H2	3.44	3.71	3.79	3.28 H2	3.52 L1
	VFM: Eating facilities	2.82 H2	2.72	2.97 L1	3.16	2.68	2.99
	Availability Bank/ATM/exchange	3.63	3.65	3.67 L1	3.74	3.67	3.69
	Shopping facilities	3.62 H2	3.30	3.82 L1	3.78	3.34 H2	3.58 L1
	VFM: Shopping facilities	3.08	2.94	3.15 L1	3.23 H2	2.85	3.24
	Internet / Wi-Fi	3.31 H1/2	3.61	3.77 H2	4.07 H2	3.95 H2	4.01 H2
	Business/Executives Lounges	3.93	3.48	3.69 L1	3.65 H2	3.61	3.86
	Availability of washrooms	3.81	3.65 L1	4.09	4.14	3.89 H2	4.13
	Cleanliness of washrooms	3.51 H1	3.42	3.95 H2	3.95	3.70 H2	3.93
	Comfort of waiting/gate areas	3.40	3.50 L1	3.84 H2	3.94	3.68 H2	3.92
Airport Environment	Terminal cleanliness	3.72	3.62 L1	4.13	4.12	3.93 H2	4.18
	Airport Ambience	3.53 H2	3.31 L1	3.91 H2	4.00	3.61 H2	3.91 L2
Arrivals Services	Passport inspection	3.67	NA	3.74 L1	4.09	3.71	3.83 L1
	Baggage delivery speed	3.72	3.76	3.70 L1	3.88	3.64	3.91
	Customs inspection	3.68	NA	3.63 L1	4.01	3.66	3.79

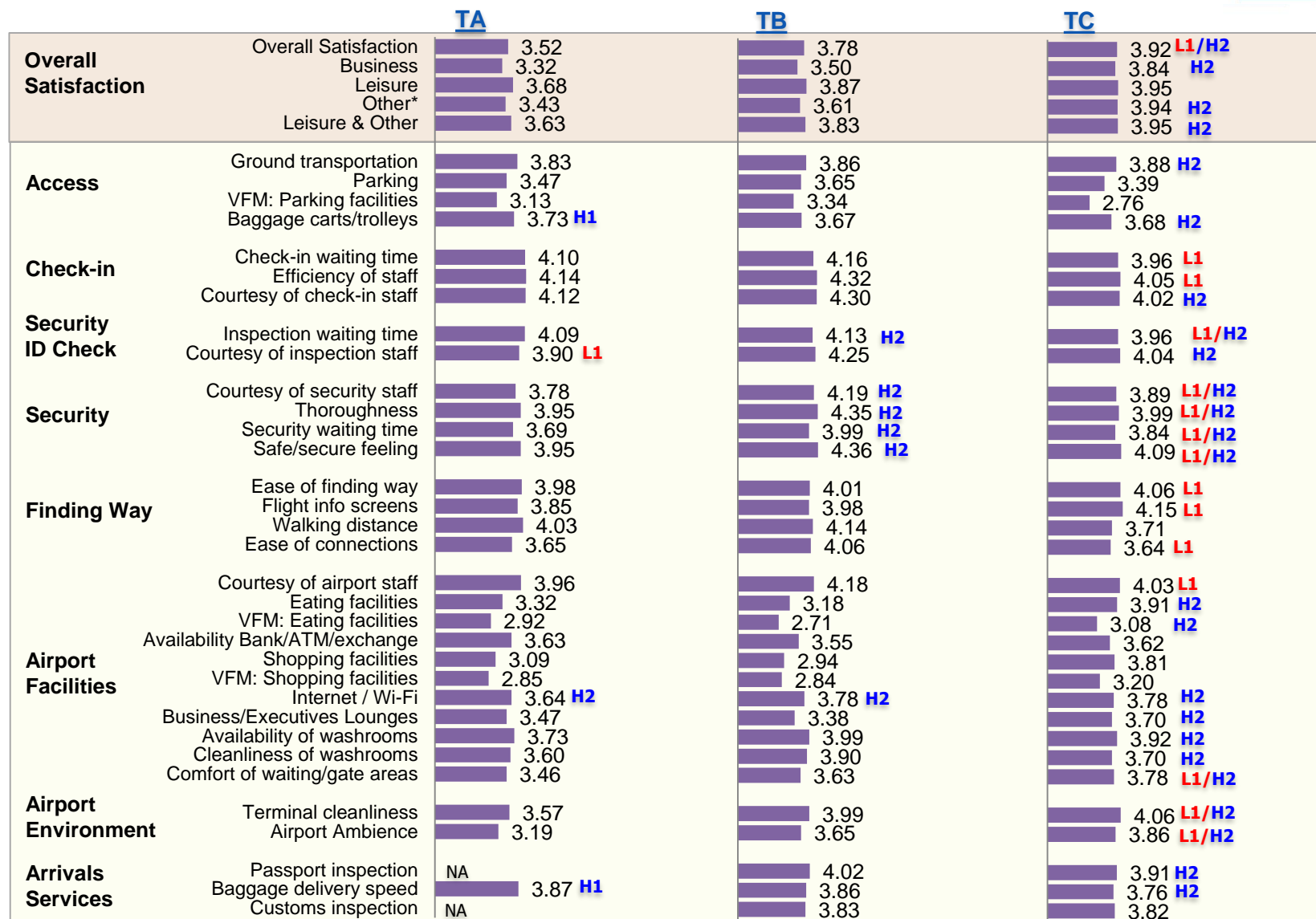
Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. * Other may include Education, Family visit, Religious events, etc.

NA: Not applicable. **H1/2—L1/2**: Significantly **Higher/Lower** than Q1 2019/Q2 2018; Q2 2019 N: T1=385; T2=176; T4=1,092; T5=735; T7=253; T8=411.

EWR Airport Performance – By Terminal

- ➔ **Terminals A:** Passenger satisfaction remained steady overall (3.52) and for business (3.32) and leisure (3.68) travelers, as well as for nearly all terminal elements in Q2 2019 compared to year-over-year (YOY—Q2 2018) and last quarter (QTQ—Q1 2019). The few exceptions are comprised of a continuation of significant improvement YOY in Internet/Wi-Fi access (3.64), as well as significant improvement QTQ in baggage carts (3.73) and arrivals bag delivery speed (3.87). Security ID/ticket check staff courtesy (3.90) declined significantly QTQ. Check-in staff efficiency (4.14) scored highest among the terminal elements in Q2 2019; shopping facilities value for the money – VFM (2.85) continued to score lowest.
- ➔ **Terminal B:** Passenger satisfaction remained steady overall (3.78) and for business (3.50) and leisure (3.87) travelers, as well as for nearly all terminal elements in Q2 2019. The few exceptions where satisfaction improved significantly YOY occurred for all four wayfinding elements, security ID/ticket check wait-time (4.13) and Internet/Wi-Fi access (3.78). The lowest scoring terminal element in Q2 2019 was, once again, eating facilities VFM (2.71); check-in staff efficiency (4.32) scored highest.
- ➔ **Terminal C:** Passenger satisfaction improved significantly overall (3.92) and for business (3.84) and for those traveling for personal reasons (3.95) YOY, as it did for most terminal elements in Q2 2019, except where it remained stable: parking facilities (3.39) and their perceived VFM (2.76, also the lowest scoring terminal element in Q2 2019), walking distance (3.71), ATMs/Mexchanges (3.62), shopping facilities (3.81) and their respective VFM (3.20) and arrivals customs inspection (3.82), or where it declined significantly QTQ: check-in wait-time (3.96) and staff efficiency (4.05), security ID/ticket check wait-time (3.96), all four TSA security check elements, 3 of 4 wayfinding elements (except walking distance – 3.71), airport staff courtesy (4.03), comfort at the gate (3.78), terminal cleanliness (4.06) and airport ambience (3.86). FIDS (4.15) scored highest (again) among the terminal elements in Q2 2019.

EWR Terminal Performance



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. H1/2- L1/2: Significantly /Higher/Lower than Q1 2019/Q2 2018. Q2 2019 N: TA=232; TB=199; TC=605.

LGA Airport Performance – By Terminal

- **Terminals A:** Passenger satisfaction in Q2 2019 remained steady overall (4.08) year-over-year (YOY—Q2 2018) and compared to last quarter (QTQ— Q1 2019), as it did for business (3.78) and Leisure (4.23) travelers, and all the terminal elements. Check-in wait-time (4.62) scored highest in Q2 2019; business lounges scored (2.50) scored lowest.
- **Terminal B:** Passenger satisfaction improved significantly overall (3.71) and among business (3.41) and leisure (3.92) travelers YOY, as did most terminal elements, except those that remained steady: 3 of 4 airport access elements, walking distance (3.96), connections (3.20), ATMs/Mexchanges (3.42), business lounges (3.27) and arrivals bag delivery speed (3.72); or those that declined significantly QTQ: baggage carts (3.11), check-in wait-time (4.24) and staff efficiency (4.22), TSA wait-time (4.15) and airport staff courtesy (4.03). Parking facilities value for the money --VFM (2.74), again, scored lowest in Q2 2019; security ID/ticket check wait-time scored highest.
- **Terminal C:** Passenger satisfaction declined significantly QTQ (since Q1 2019) overall (3.56) and among business travelers (3.32) and those traveling for personal reasons (3.75), as well as many terminal elements: Check-in wait-time (3.98) and staff efficiency (4.08) – both also slipped significantly YOY, all six TSA/security check elements, ease of finding way (4.00) and FIDS (3.99), airport staff courtesy (4.01), eating facilities (3.59), shopping facilities (3.22), restroom cleanliness (3.62) and availability (3.73), comfort at the gate (3.43), terminal cleanliness (3.67) and airport ambience (3.35). Terminal C overall satisfaction remained stable YOY as it did on nearly all elements, except the two check-in elements mentioned above and arrivals bag delivery speed (3.62) which also declined significantly YOY. Satisfaction with ease of connections (4.24) scored highest in Q2 2019; parking facilities VFM (2.64) scored lowest.
- **Terminal D:** Passenger satisfaction declined significantly QTQ overall (3.60) and among leisure travelers (3.68), as did many terminal elements: check-in wait-time (3.91) and staff efficiency (4.05), security ID/ticket check wait-time (3.90) and staff courtesy (3.94, also down significantly YOY), thoroughness (3.99), TSA wait-time (3.88), ease of finding way (4.06), FIDS (4.01), airport staff courtesy (4.01) and eating facilities (3.39) – both also down significantly YOY, restroom cleanliness (3.54) and availability (3.70) -- both also down significantly YOY, comfort at the gate (3.50), terminal cleanliness (3.62) and airport ambience (3.27, also down significantly YOY). Satisfaction overall and with many elements (other than those mentioned above) remained stable YOY. Connections (4.24) scored highest in Q2 2019; eating facilities VFM (2.71), again, scored lowest.

LGA Terminal Performance

		TA	TB	TC	TD
Overall Satisfaction	Overall Satisfaction	4.08	3.71 H2	3.56 L1	3.60 L1
	Business	3.78	3.41 H2	3.32 L1	3.44
	Leisure	4.23	3.92 H2	3.73	3.68 L1
	Other*	4.00	3.47	3.79	3.44
	Leisure & Other	4.17	3.83 H2	3.75 L1	3.64 L1
Access	Ground transportation	3.75	3.24	3.27	3.41
	Parking	3.40	3.12	2.77	3.30
	VFM: Parking facilities	2.75	2.74	2.64	2.86
	Baggage carts/trolleys	3.88	3.11 L1	3.43	3.12
Check-in	Check-in waiting time	4.62	4.24 L1/H2	3.98 L1/2	3.91 L1
	Efficiency of staff	4.52	4.22 L1	4.08 L1/2	4.05 L1
	Courtesy of check-in staff	4.38	4.20 H2	4.05	4.12
Security ID Check	Inspection waiting time	4.52	4.30 H2	3.96 L1	3.90 L1
	Courtesy of inspection staff	4.48	4.17 H2	3.98 L1	3.94 L1/2
Security	Courtesy of security staff	4.03	4.08 H2	3.90 L1	3.91
	Thoroughness	4.23	4.13 H2	3.98 L1	3.99 L1
	Security waiting time	4.33	4.15 L1/H2	3.82 L1	3.88 L1
	Safe/secure feeling	4.55	4.21 H2	4.13 L1	4.17
Finding Way	Ease of finding way	4.19	3.96 H2	4.00 L1	4.06 L1
	Flight info screens	4.34	4.01 H2	3.99 L1	4.01 L1
	Walking distance	4.29	3.96	3.83	4.01
	Ease of connections	4.00	3.20	4.24	4.24
Airport Facilities	Courtesy of airport staff	4.23	4.03 L1/H2	4.01 L1	4.01 L1/2
	Eating facilities	3.74	3.42 H2	3.59 L1	3.39 L1/2
	VFM: Eating facilities	3.38	3.00 H2	2.89	2.71
	Availability Bank/ATM/exchange	2.88	3.42	3.36	3.44
	Shopping facilities	2.85	3.37 H2	3.22 L1	3.36
	VFM: Shopping facilities	2.83	3.02 H1/2	2.93	2.97
	Internet / Wi-Fi	3.65	3.73 H2	3.73	3.82
	Business/Executives Lounges	2.50	3.27	3.67	3.31
	Availability of washrooms	4.03	3.85 H2	3.73 L1	3.70 L1/2
	Cleanliness of washrooms	3.97	3.72 H2	3.62 L1	3.54 L1/2
Airport Environment	Comfort of waiting/gate areas	4.06	3.74 H2	3.43 L1	3.50 L1
	Terminal cleanliness	4.35	3.86 H2	3.67 L1	3.62 L1
Arrivals Services	Airport Ambience	4.00	3.64 H1/2	3.35 L1	3.27 L1/2
	Passport inspection	NA	NA	NA	NA
	Baggage delivery speed	4.00	3.72	3.62 L2	3.70
	Customs inspection	NA	NA	NA	NA

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. H1/2- L1/2: Significantly Higher/Lower than Q1 2019/Q2 2018. Q2 2019 N: TA=39; TB=410; TC=308; TD=232.