



J.D. POWER

2018 Airport Satisfaction StudySM

Newark International - EWR

Michael Taylor
Practice Lead

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Summary of Findings

EWB improved in all factor areas, resulting in a significant 15 point increase in overall satisfaction but rankings did not improve

Key Takeaways

- Compared to the Mega airport average, EWB's biggest weakness is in the Terminal Facilities factor. This is the only factor area EWB did not significantly improve.
- EWB performs below the segment average for restroom cleanliness and adequate signage, two of the most impactful KPIs in the 2018 Airport Satisfaction Study.
- Rest room scores at EWB are the lowest in the category
- As with all PANYNJ airports, the per-person spending on non-aeronautical revenues improves dramatically with higher satisfaction. This is a major opportunity for EWB and the other PANYNJ airports.
- EWB is in line with the Mega airport average in the percent of passengers waiting 15 minutes or less for their baggage

Recommended Actions

- Improvements to Terminal Facilities will be the greatest opportunity for EWB to improve in the rankings
- Restrooms are a key indicator of Terminal Facilities and EWB rates the lowest in the Mega category. Condition and cleanliness go hand-in-hand. What is the average age of restroom refurbishment at EWB?
- Only 44% of EWB passengers buy food or beverage despite dramatically improved F, B & R scores.
 - Food quality, variety and ambiance have improved but potential improvement remains.
- EWB lags other Mega airports in the number and availability of in-seat power outlets.

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

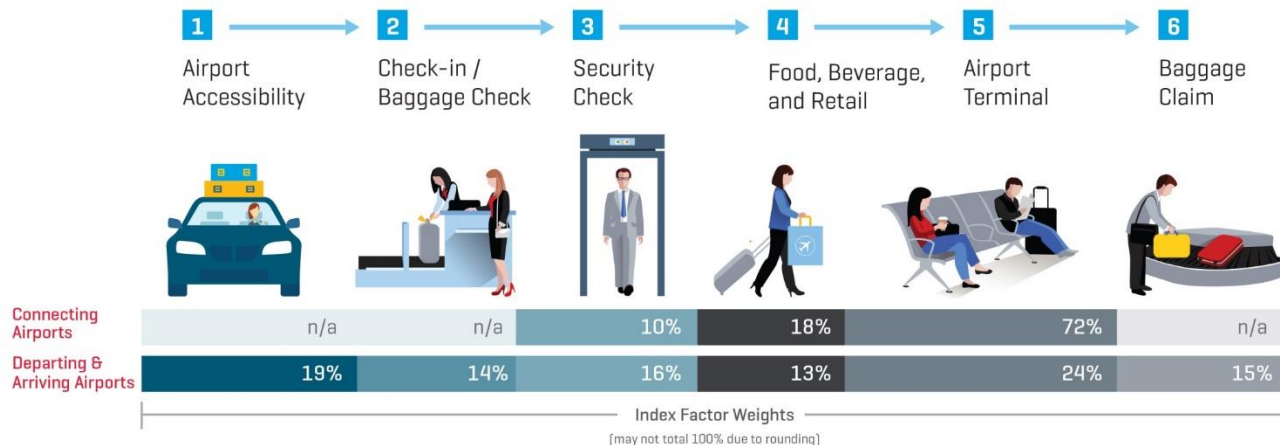
EWR – 978 responses

Large – 500 responses

Medium – 300 responses

2018 Survey Methodology

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



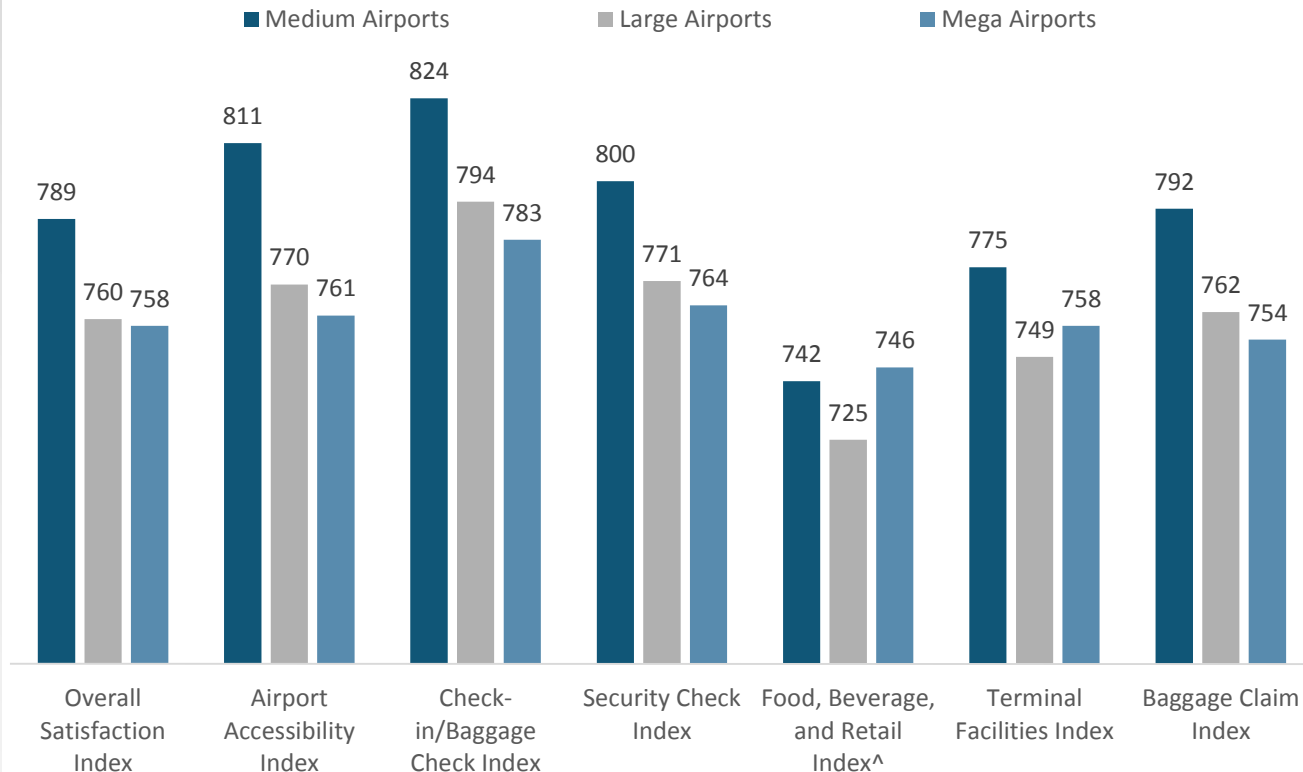


Overall Performance

Segment Factor Performance

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

Segment Factor Performance



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

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

2018 Overall Satisfaction

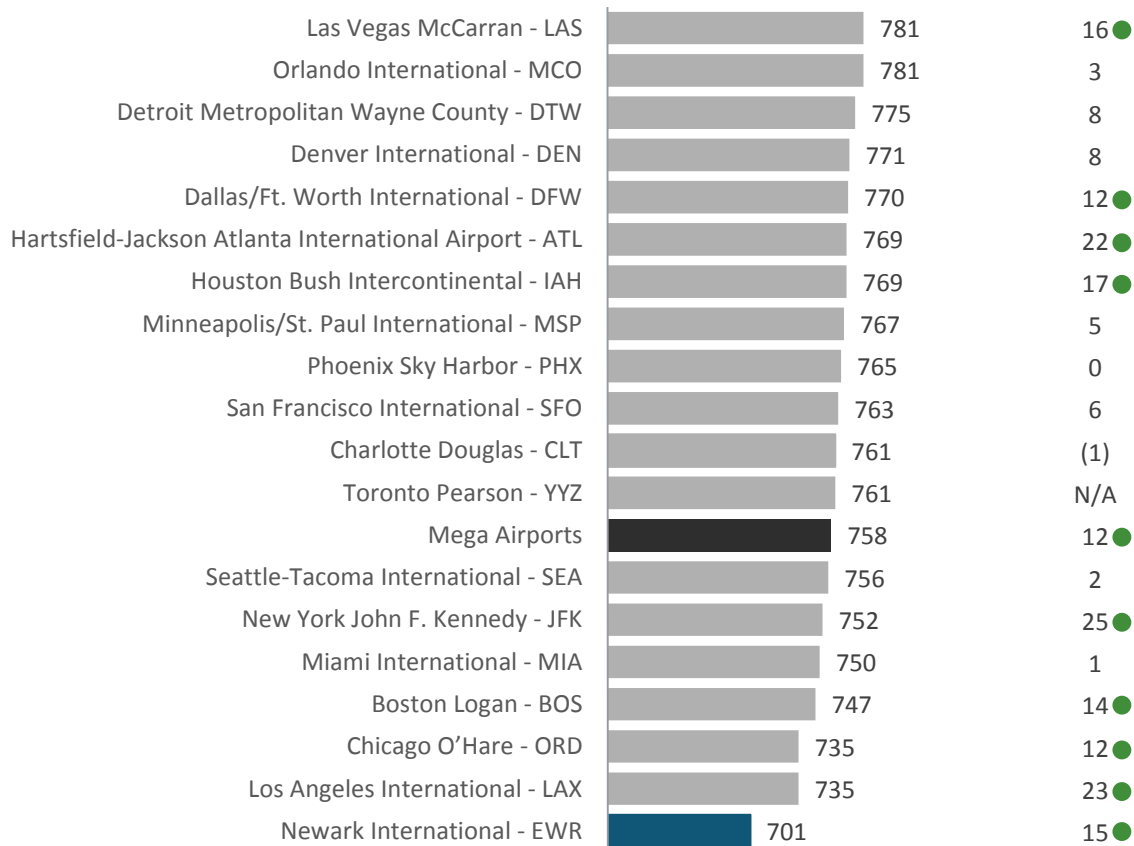
EWR ranks 19th for Overall Satisfaction in 2018

EWR makes a significant 15 point improvement year over year, comparable to the 12 point significant improvement of the Mega Airport segment

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

Overall Satisfaction Index: Mega Airports

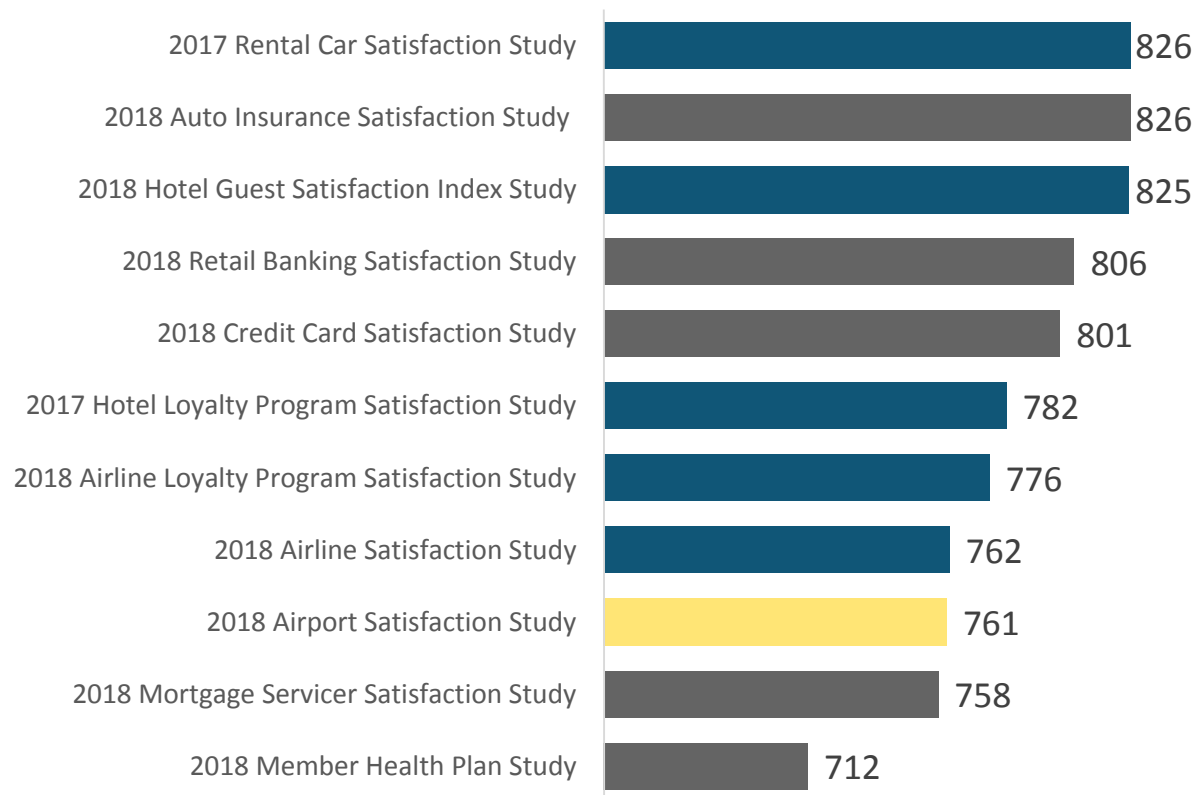
Change vs
2017



How Do Airports Stack Up?

Airport satisfaction is on par with Airline satisfaction

Cross Industry Rankings (Service Industries)

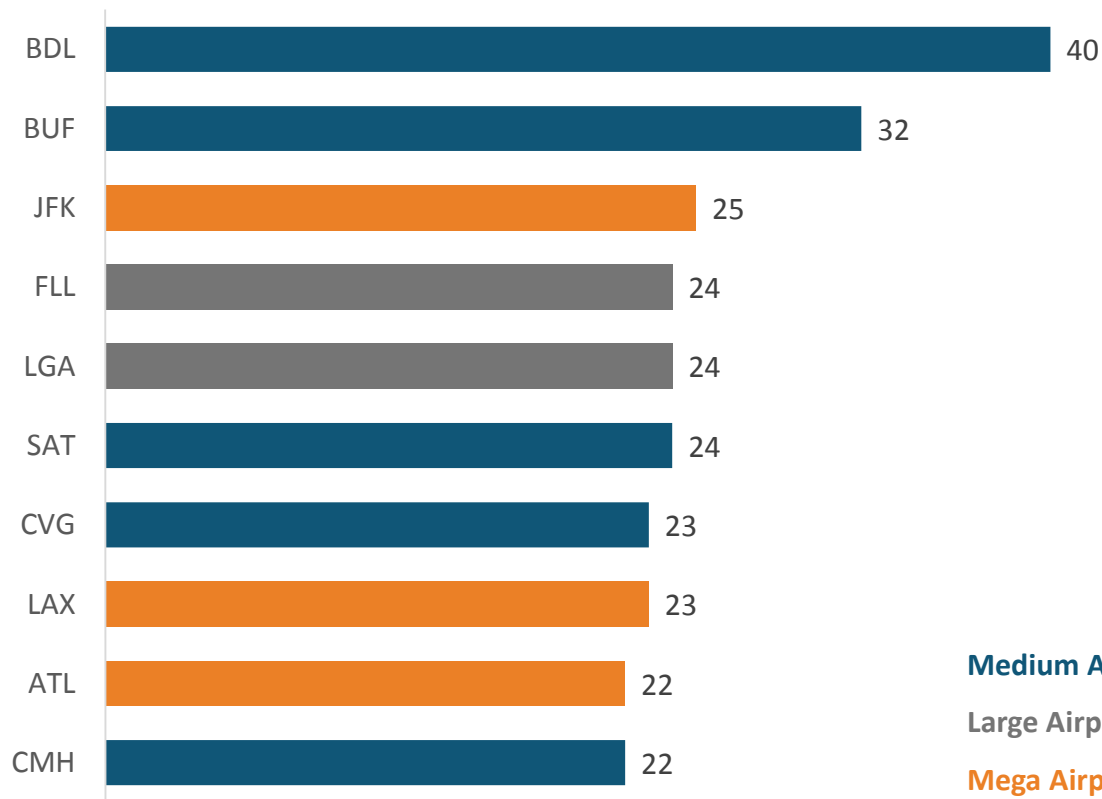


Most Improved Airports

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

Note: Top 10 most improved airports shown

2018 Most Improved Airports



Medium Airports

Large Airports

Mega Airports

Factor Performance

EWR improved in every factor area from the previous year

Every factor improvement is statistically significant with the exception of Terminal Facilities.

Factor Performance

		Newark International - EWR	Newark International – EWR 2017	Mega Airports
Airport Accessibility Index	+26	697	671	761
Check-in/Baggage Check Index	+24	735	711	783
Security Check Index	+19	701	682	764
Food, Beverage, and Retail Index^	+22	702	680	746
Terminal Facilities Index	+10	694	684	758
Baggage Claim Index	+30	697	667	754

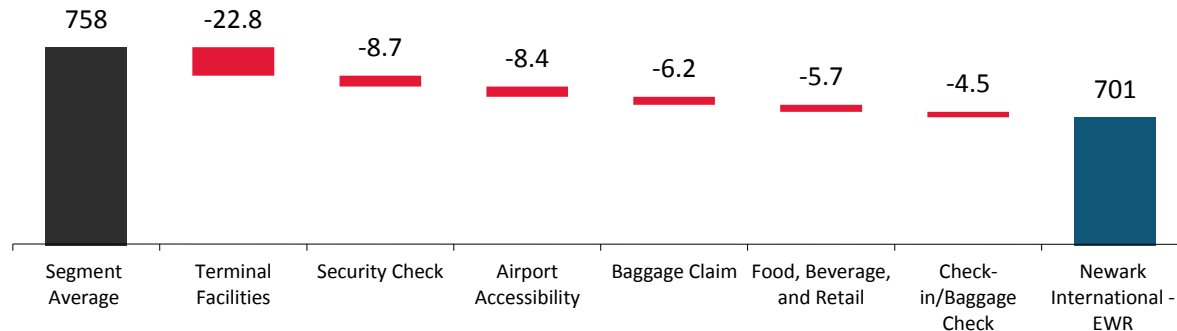
Note: ^Based to those who purchased food/beverage and/or merchandise/services while at the airport

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

SWOOP Brand v. Segment

Compared to the Mega airport average, EWR's greatest weakness is in the Terminal Facilities factor

Weighted Gaps – EWR vs. Mega Airports

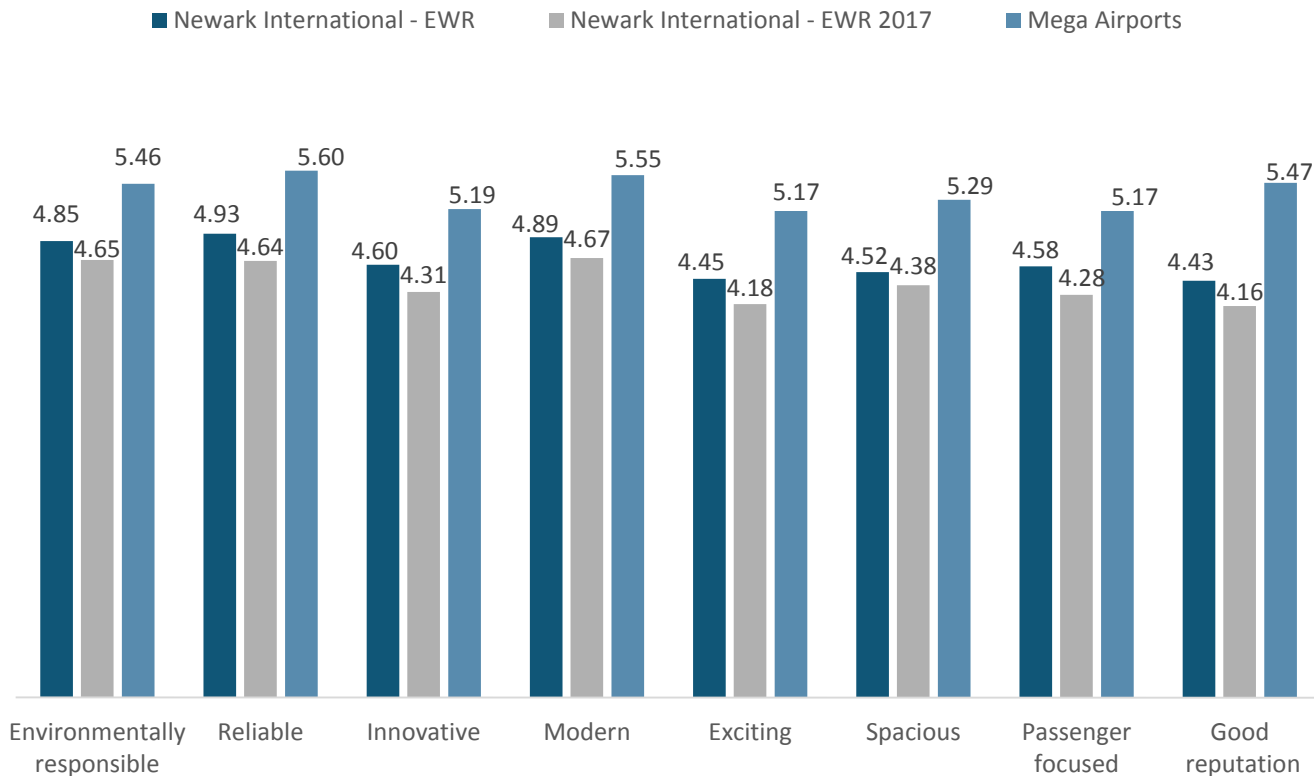


Brand Image

EWR improved brand image in every area compared to 2017

“Passenger focused” is the brand image area to improve the most followed by “Reliable” and “Innovative”

Brand Image Performance

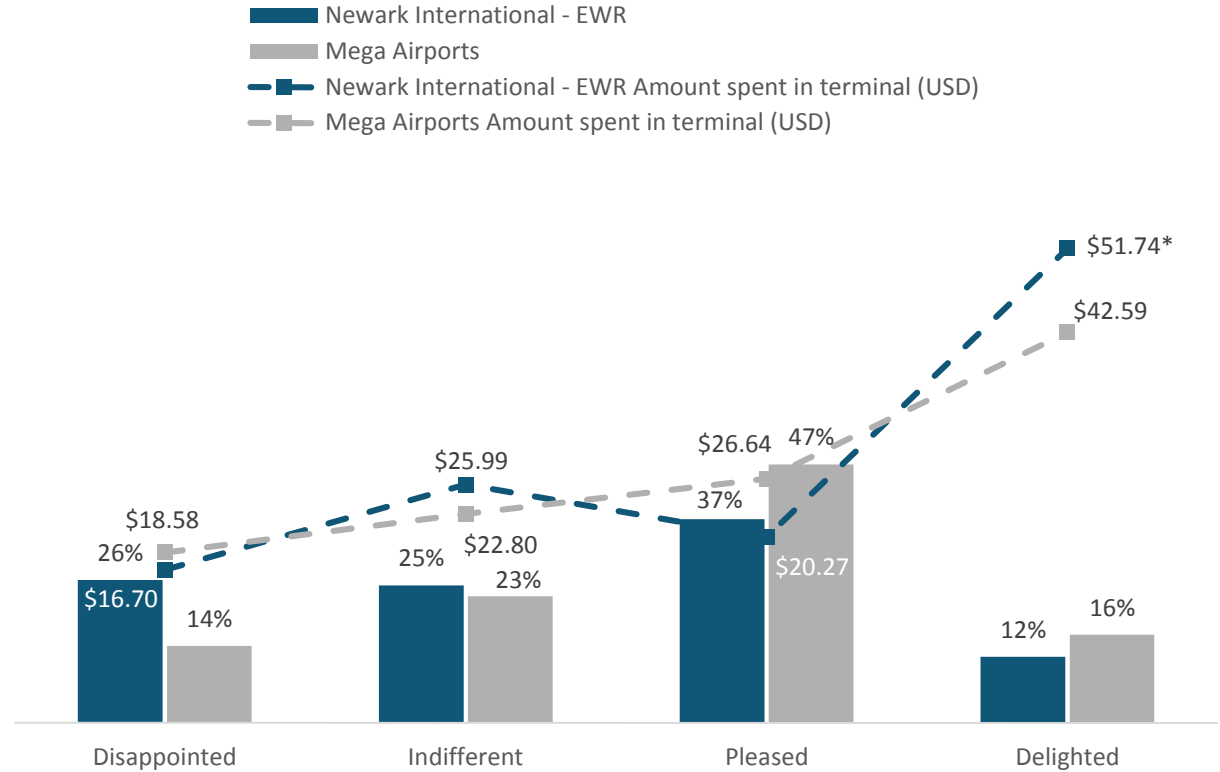


The ROI of Satisfaction

Delighted passengers spend more

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

Overall Satisfaction and In Terminal Spending

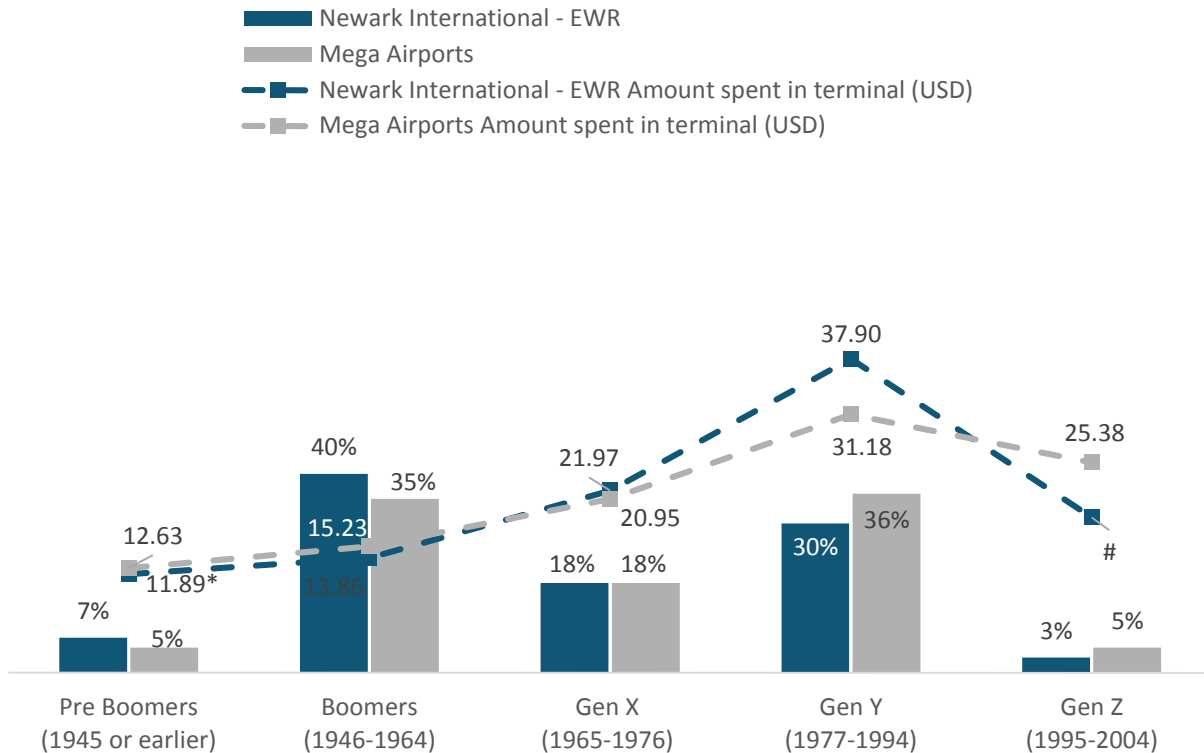


Note:*small sample size (n=30-99).

Generational Spend

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

Overall Satisfaction and In Terminal Spending



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



Airport Accessibility

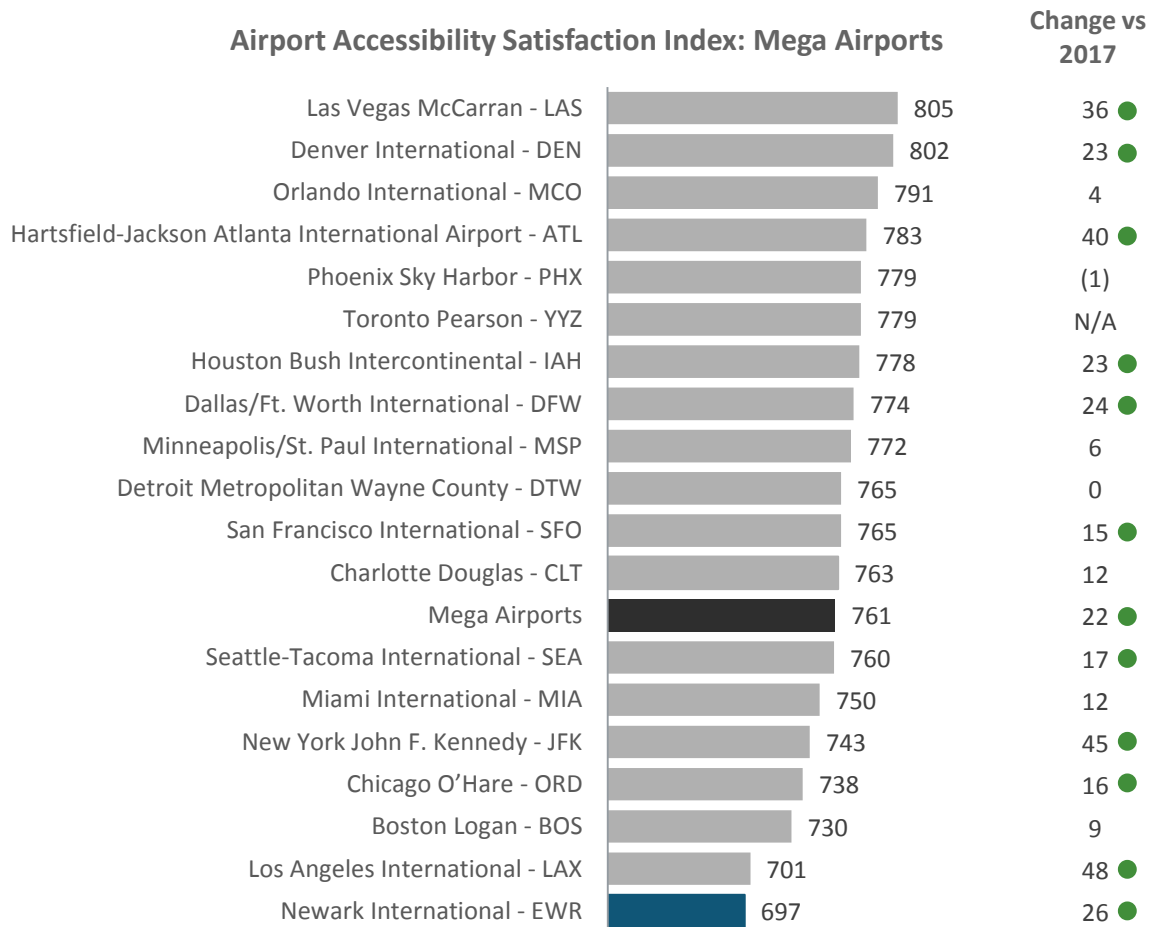
Airport Accessibility Satisfaction

EWR ranks 19th for Airport Accessibility Satisfaction after a significant 26 point increase, down from 17th place ranking in 2017

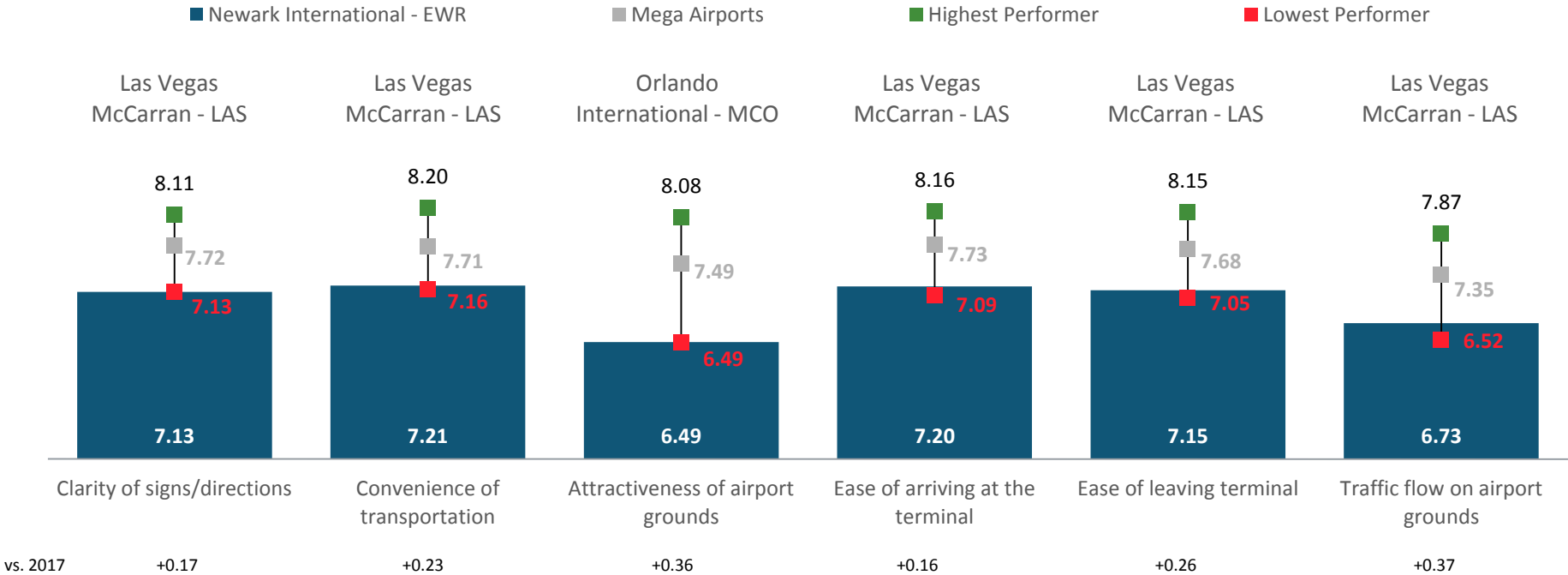
The mega airport average also improves significantly – by 22 points.

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).

Airport Accessibility Satisfaction Index: Mega Airports

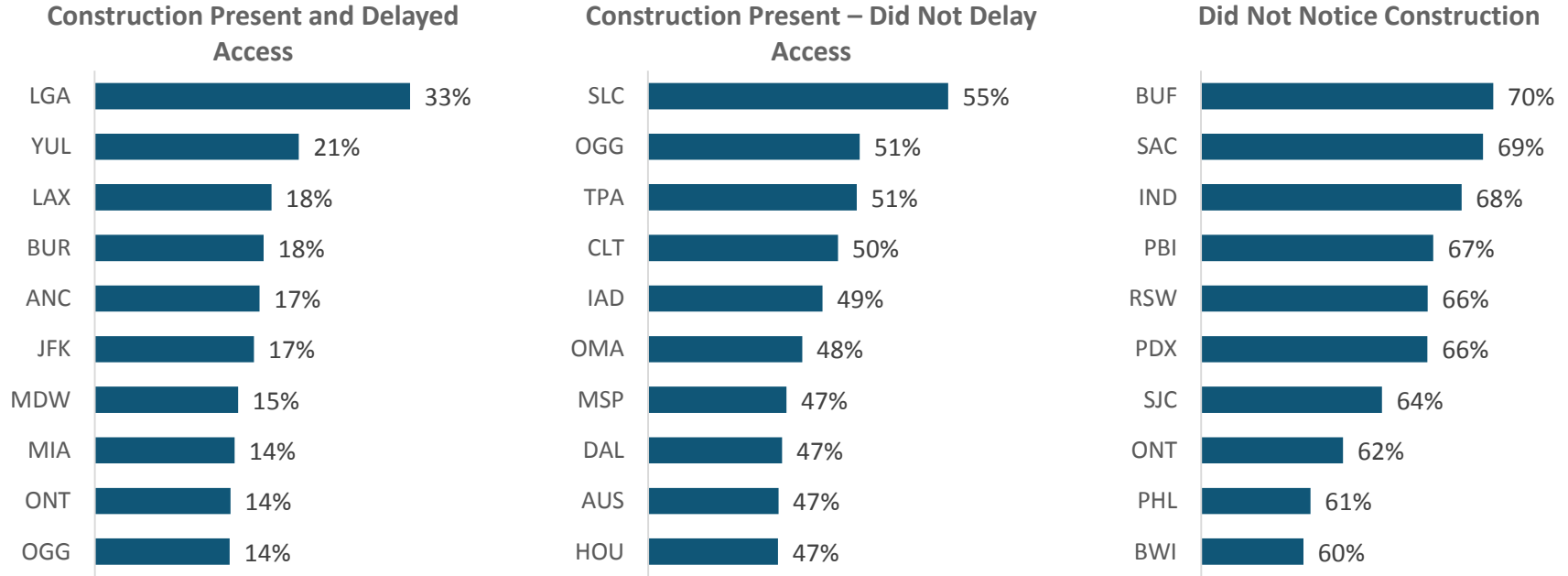


Attribute Performance



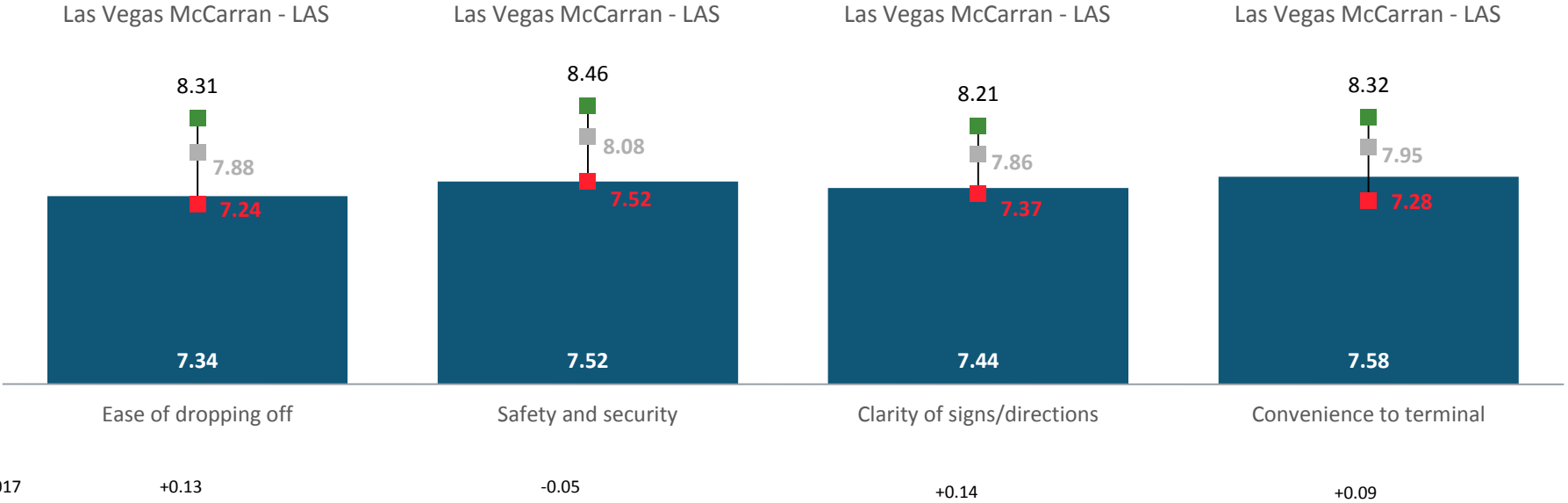
Airport Accessibility Satisfaction

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

■ Newark International - EWR ■ Mega Airports ■ Highest Performer ■ Lowest Performer

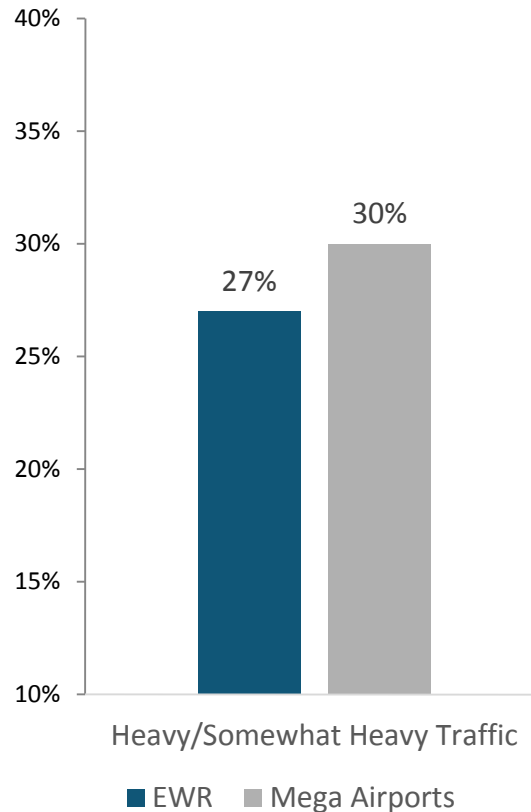


Airport Accessibility

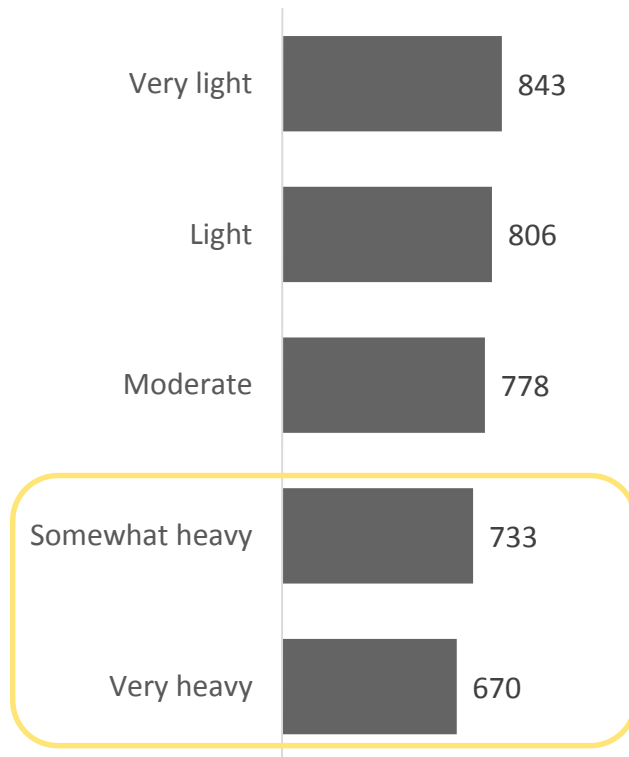
Traffic congestion impacts Airport Accessibility satisfaction

EWR's traffic outside the terminal is perceived as less than the Mega airport average.

Traffic Congestion Getting to the Airport



Airport Accessibility Index by Traffic Congestion – Total Industry



Airport Accessibility

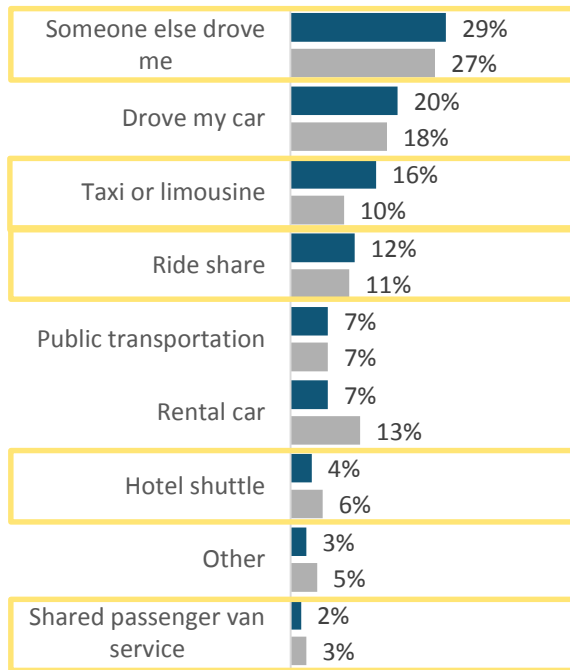
Airport Accessibility satisfaction is 176 higher when passengers are able to easily find curb space at Mega airports

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

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

How Did You Travel to the Airport?

■ Newark International - EWR ■ Mega Airports



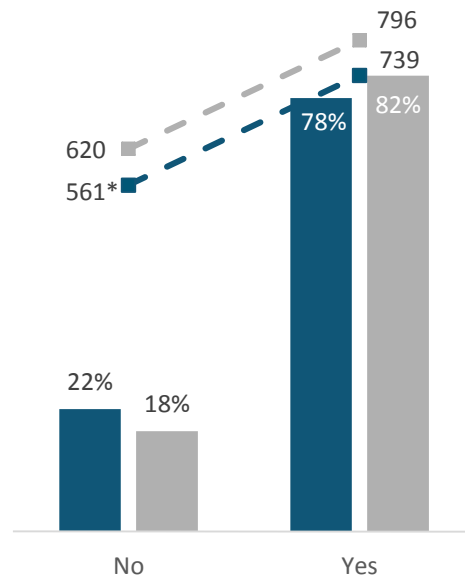
Was it Easy to Find Curb Space Upon Arrival?

■ Newark International - EWR

■ Mega Airports

■ Newark International - EWR Airport Accessibility Index

■ Mega Airports Airport Accessibility Index



2018 Airport Satisfaction Study

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Check-In/Baggage Check

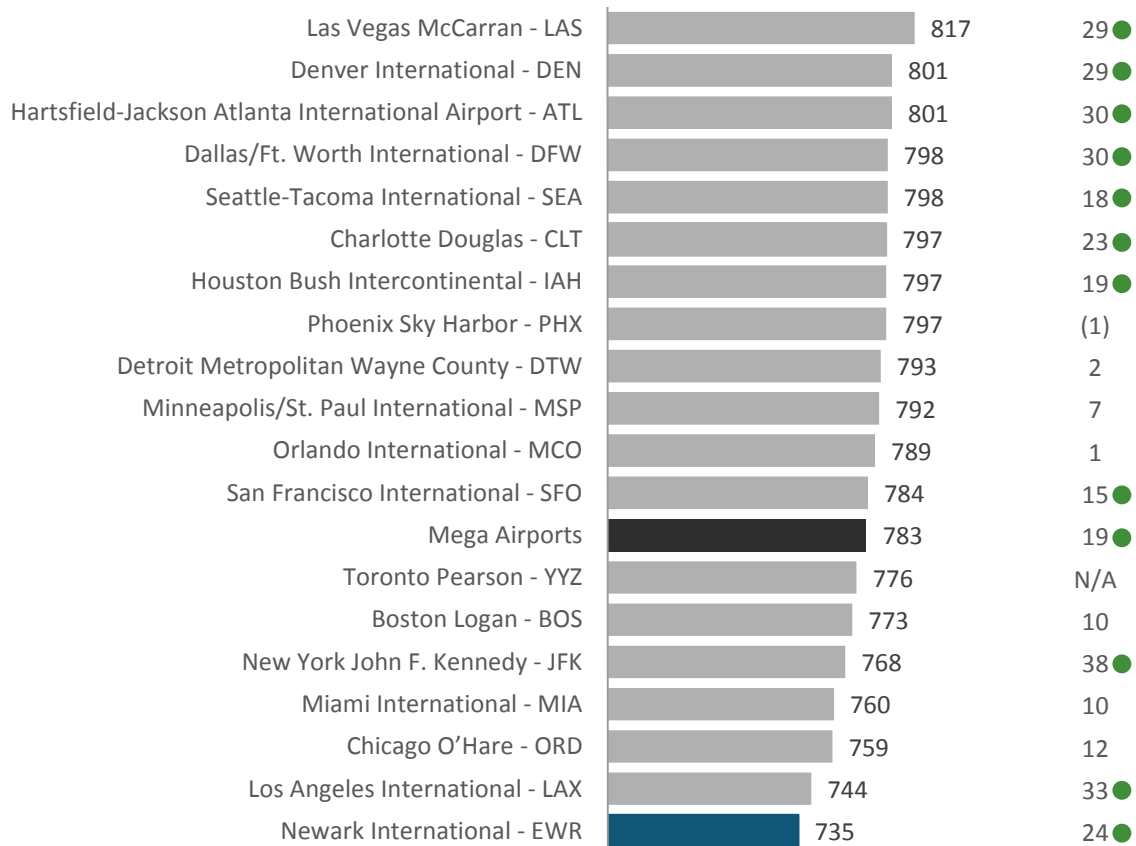
Check-In/Baggage Check Satisfaction

EWR ranks 19th for Check-In/Baggage Satisfaction despite a significant 24 point increase.

The mega airport average also improves significantly – by 19 points.

Check-In/Baggage Check Satisfaction Index: Mega Airports

Change vs
2017



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

Check-In/Baggage Check

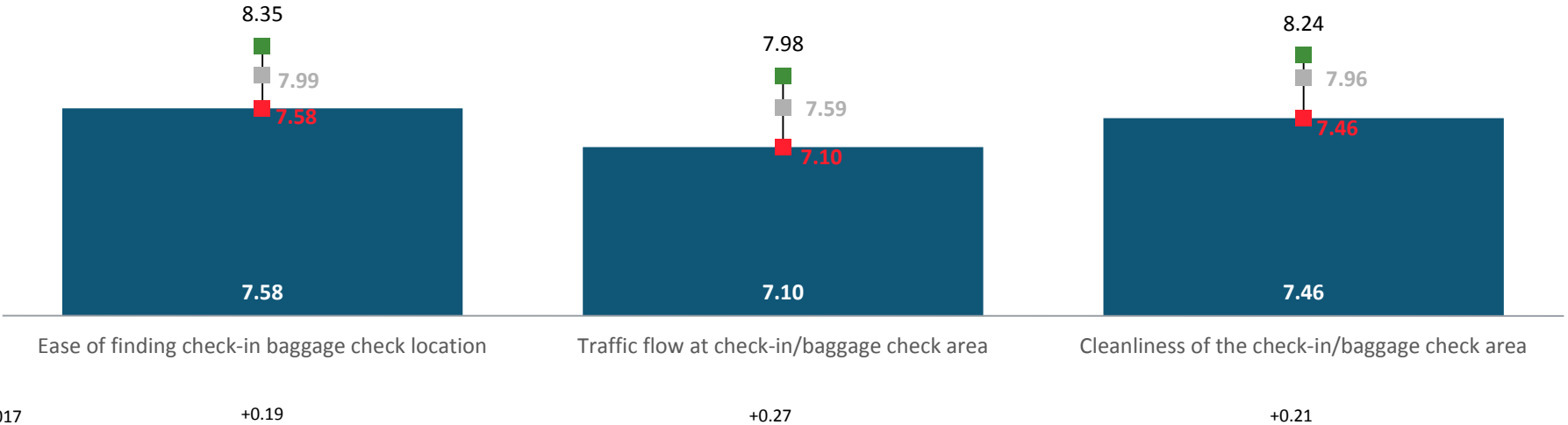
Attribute Performance

■ Newark International - EWR ■ Mega Airports ■ Highest Performer ■ Lowest Performer

Las Vegas McCarran - LAS

Las Vegas McCarran - LAS

Las Vegas McCarran - LAS



Check-In/Baggage Check Satisfaction

EWR scores are highest when passengers use Curbside check-in and lowest when passengers check-in online

This follows the same trend seen in the Mega airport segment, but the discrepancies in scores between check in methods are much larger at Newark International Airport

At Newark International Airport the biggest difference between Main Counter and Self Check-in Kiosk check-in methods is with *Traffic flow at check-in*. *Ease of finding* and *Cleanliness* have comparable scores.

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

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

Newark International - EWR	Main Counter	Self Check-in Kiosk	Curbside	Online
Ease of finding check-in/baggage check location	7.65	7.60	8.01*	7.30
Traffic flow at check-in	7.25	7.00	7.70*	6.81
Cleanliness of check-in area	7.54	7.45	7.85*	7.22

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



Security Check

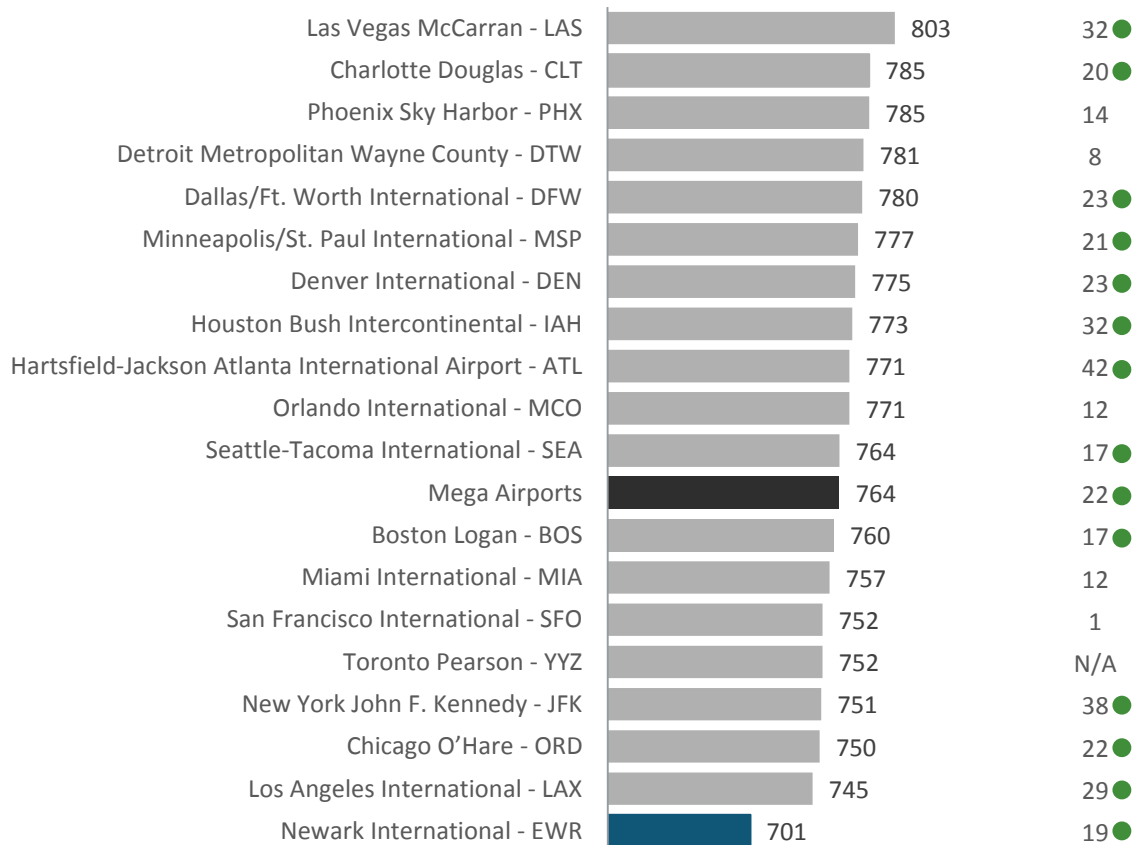
Security Check Satisfaction

EWR ranks 19th in Security Check Satisfaction after a significant 19 point increase.

The mega airport average also improves significantly – by 22 points.

Security Check Satisfaction Index: Mega Airports

Change vs
2017



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

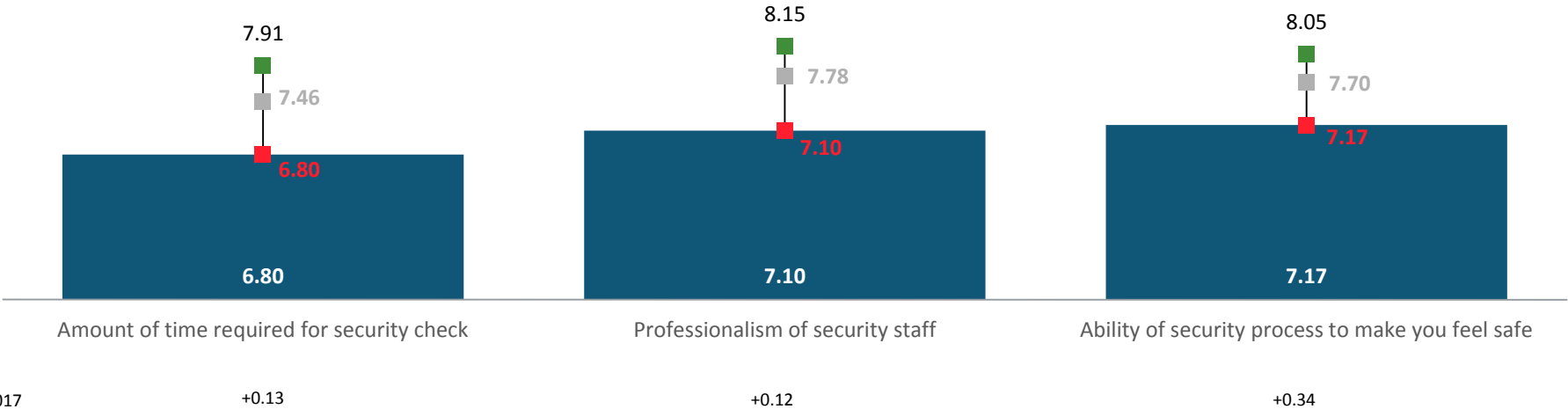
Attribute Performance

■ Newark International - EWR ■ Mega Airports ■ Highest Performer ■ Lowest Performer

Las Vegas McCarran - LAS

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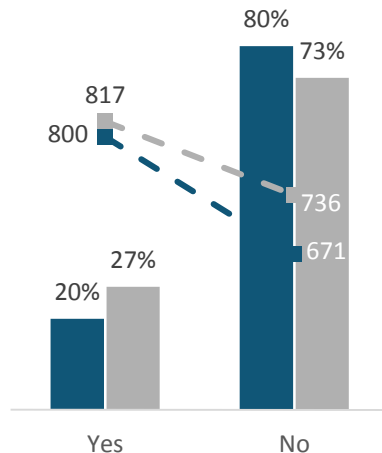


Security Check

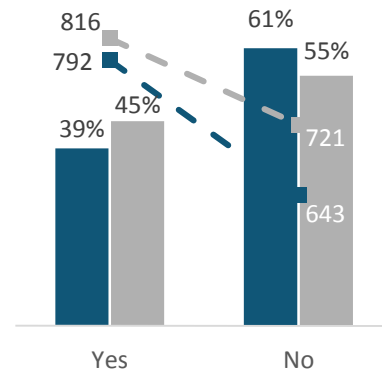
A speedy security check (10 minutes or less) and appropriate signage increase security check satisfaction

EWR falls below the Mega airport average for appropriate signage and a speedy security check

Signage to Inform Security Wait Time by Security Check Satisfaction



Time to Get Through Security Less than 11 Minutes

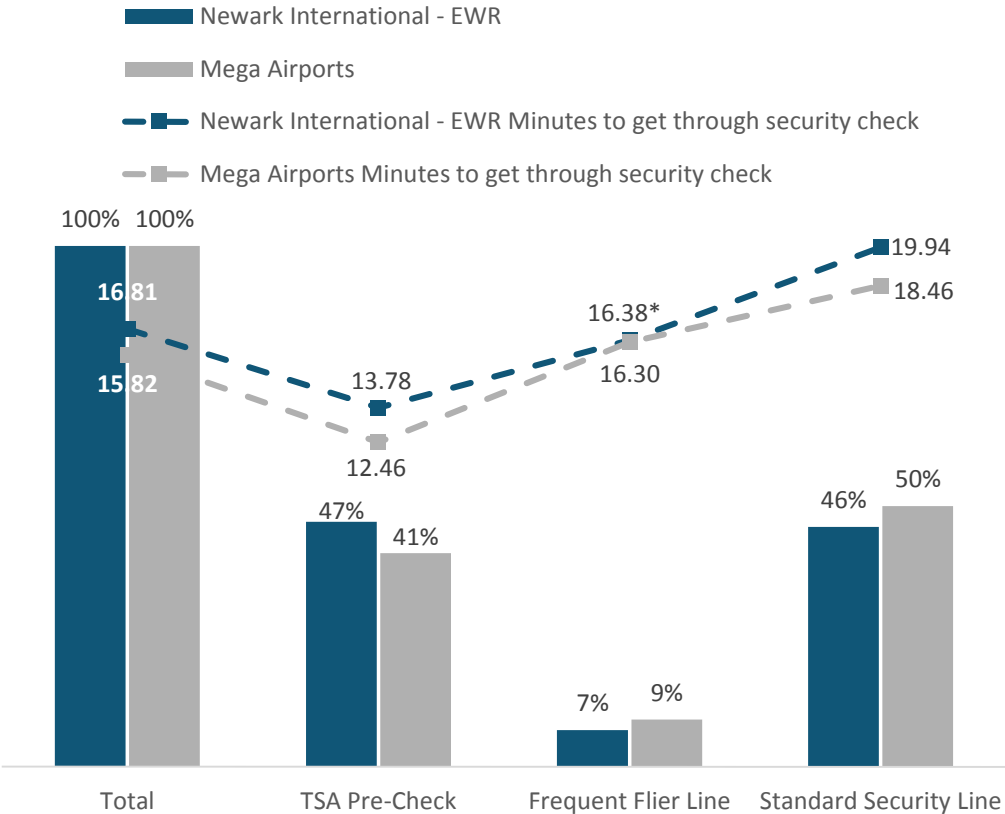


Security Check

Security wait times are a minute longer at EWR compared to Mega airports.

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

Security Line Type and Wait Time



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



Food, Beverage, & Retail Experience

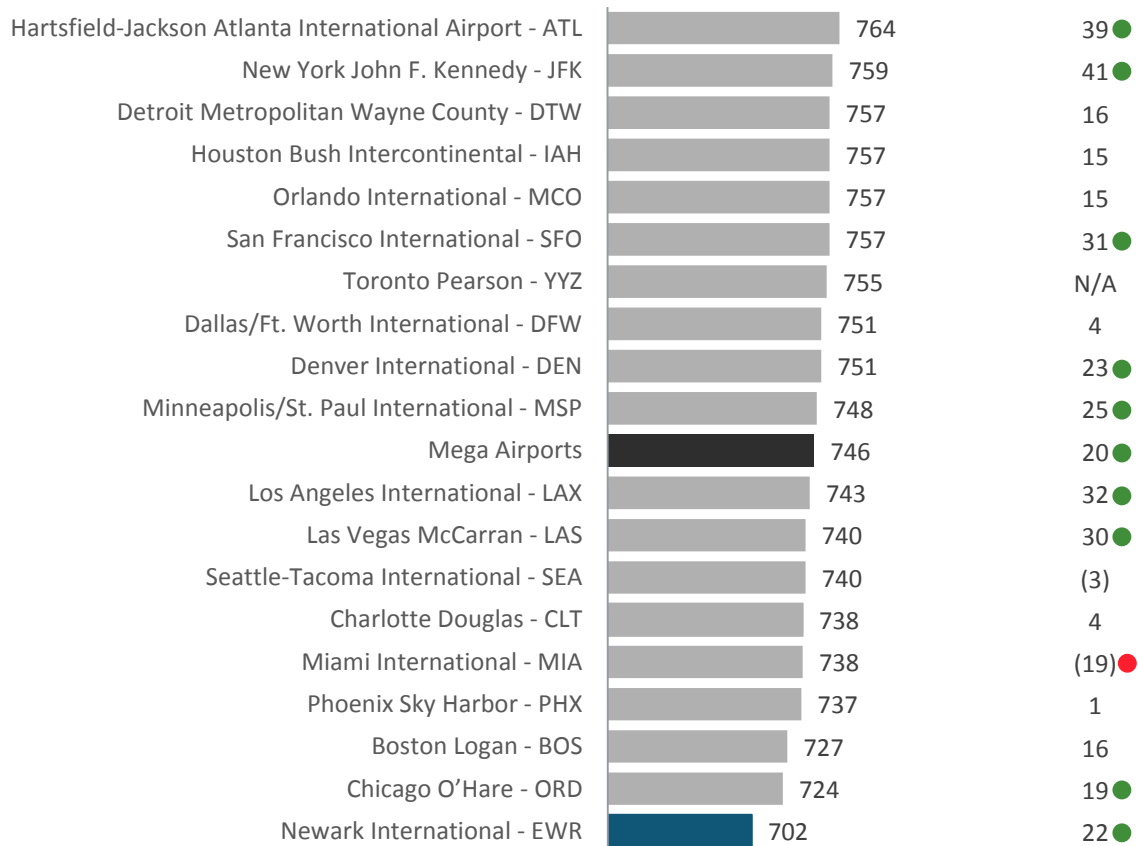
Food, Beverage, & Retail Satisfaction

EWR ranks 19th in Food, Beverage, & Retail Satisfaction after a significant 22 point increase.

The mega airport average also improves significantly – by 20 points.

Food, Beverage, & Retail Satisfaction Index: Mega Airports

Change vs
2017



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

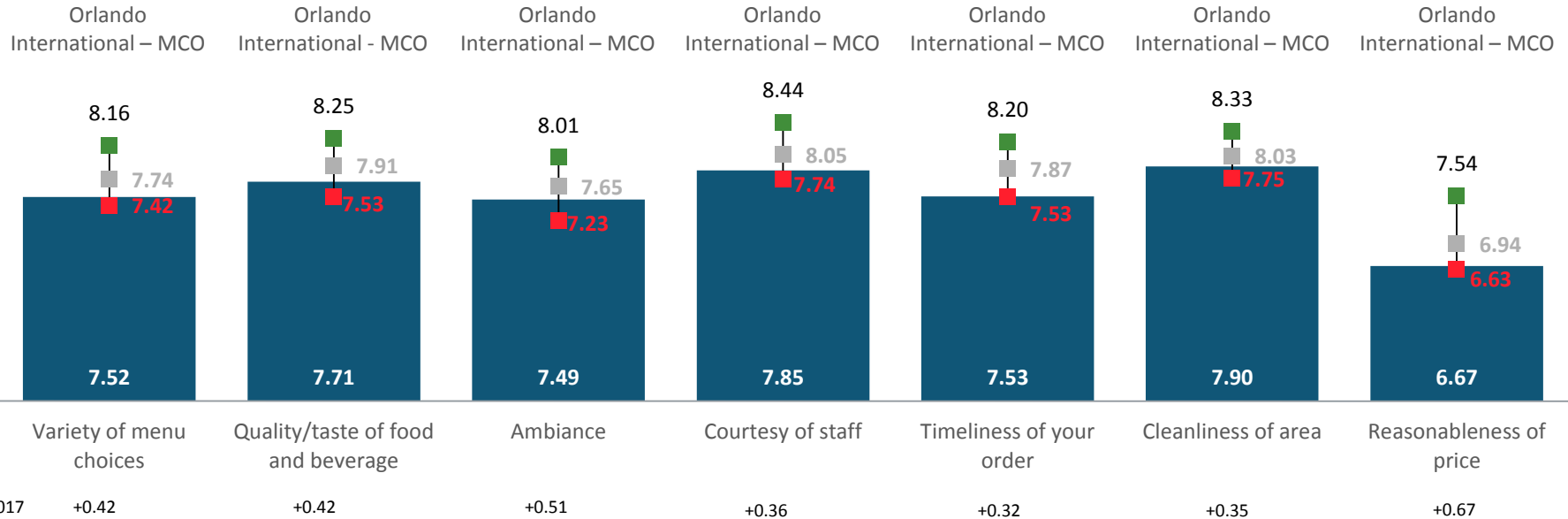
Attribute Performance – Restaurant/Bar

■ Newark International - EWR

■ Mega Airports

■ Highest Performer

■ Lowest Performer



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

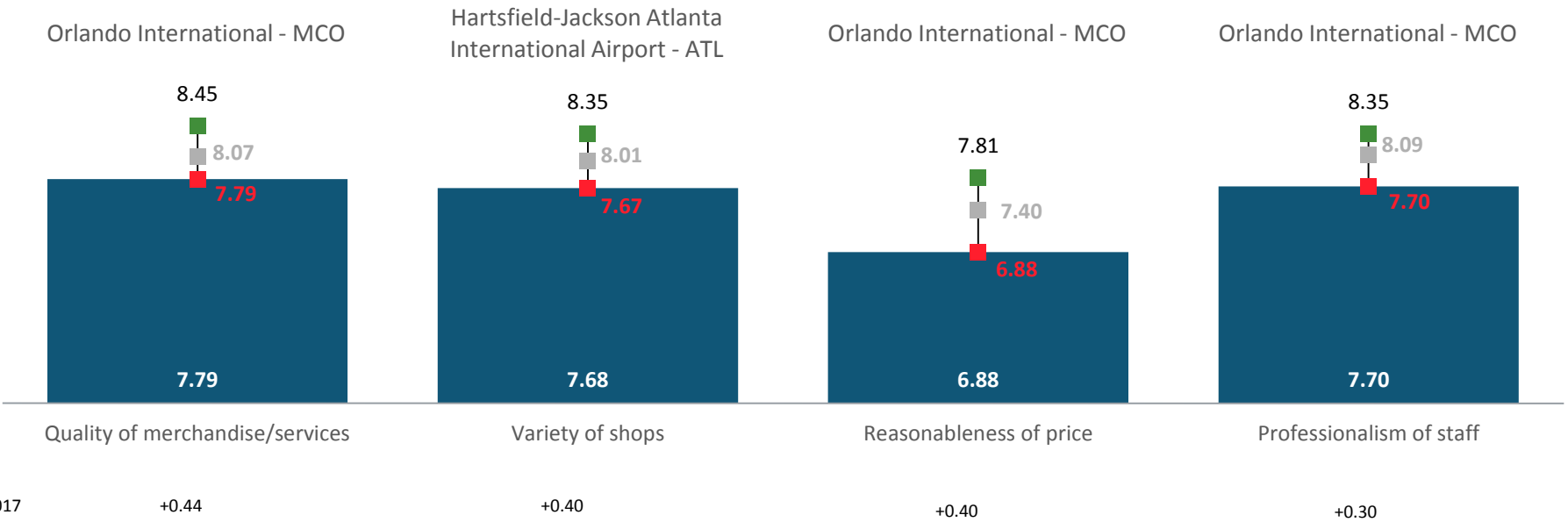
Attribute Performance – Retail Service

■ Newark International - EWR

■ Mega Airports

■ Highest Performer

■ Lowest Performer



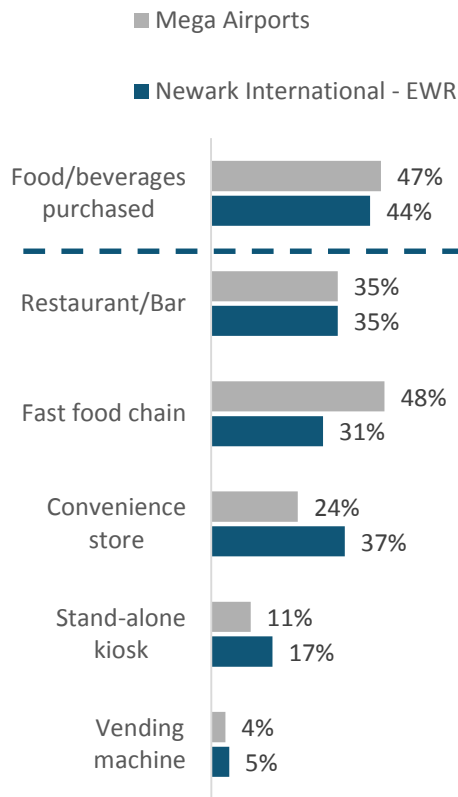
Note: Based to those who purchased food/beverage and/or merchandise/services while at the airport

Food, Beverage, & Retail Performance

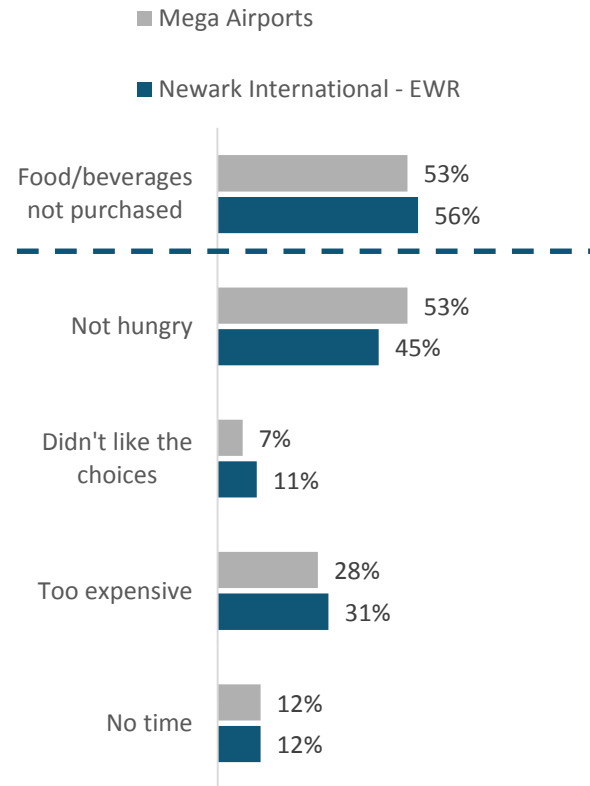
Restaurant/Bar and Convenience store are the most common places passengers purchase F&B at EWR

Passengers frequent fast food chains at EWR less than at other Mega airports

Purchase Food and/or Beverages



Reason for Not Purchasing

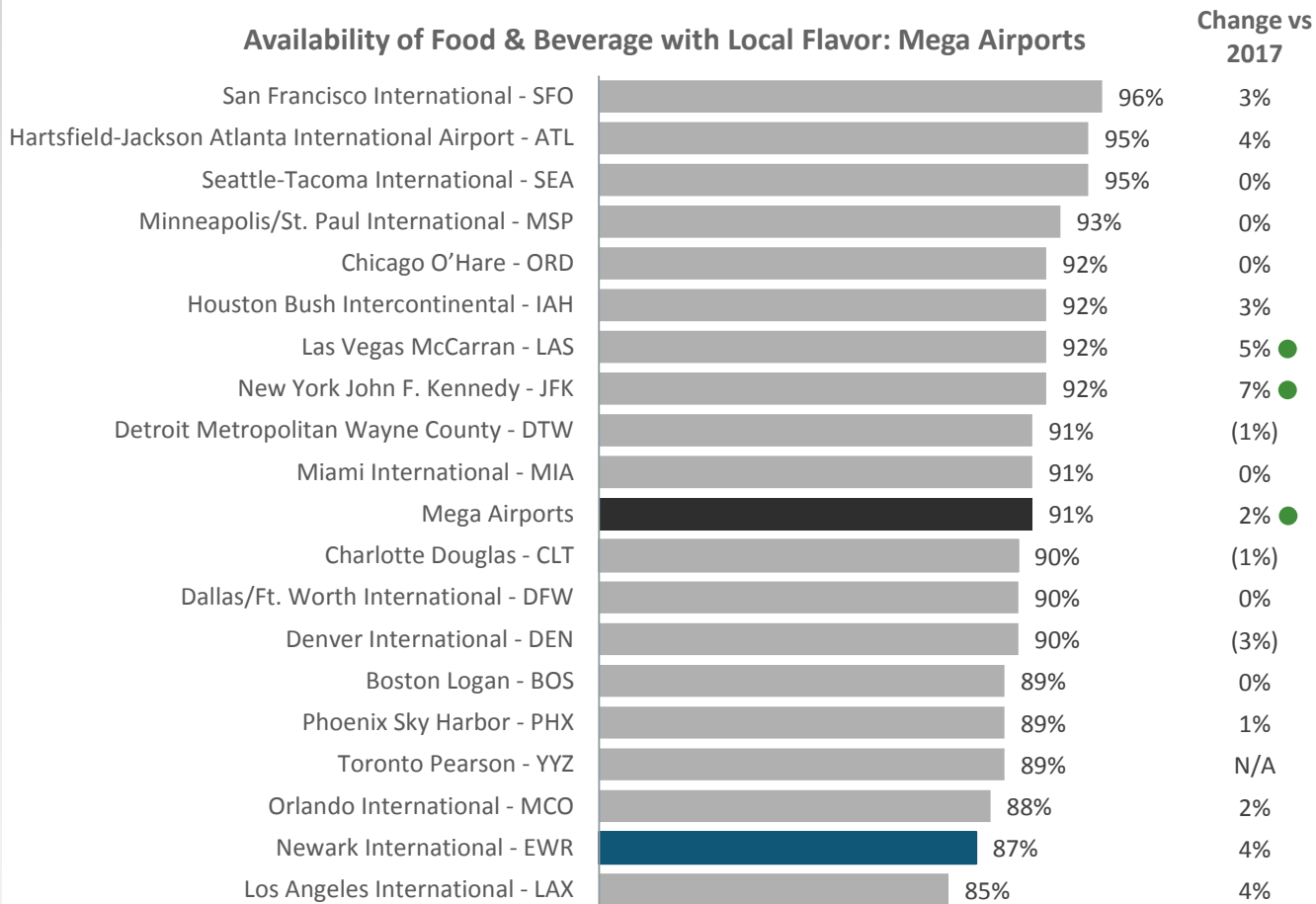


Food, Beverage, & Retail Satisfaction

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

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

Availability of Food & Beverage with Local Flavor: Mega Airports



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).



Terminal Facilities

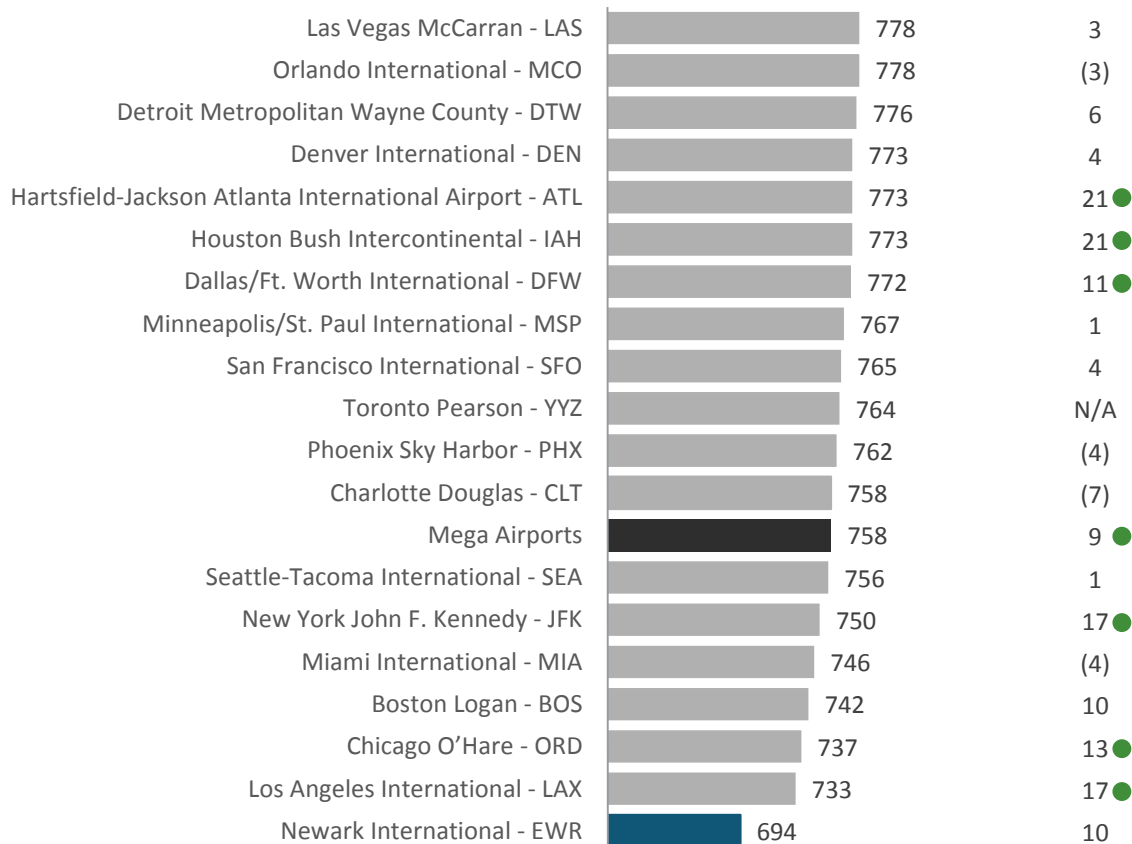
Terminal Facilities Satisfaction

EWR ranks 19th in Terminal Facilities Satisfaction after a 10 point increase.

The mega airport average improves significantly – by 9 points.

Terminal Facilities Satisfaction Index: Mega Airports

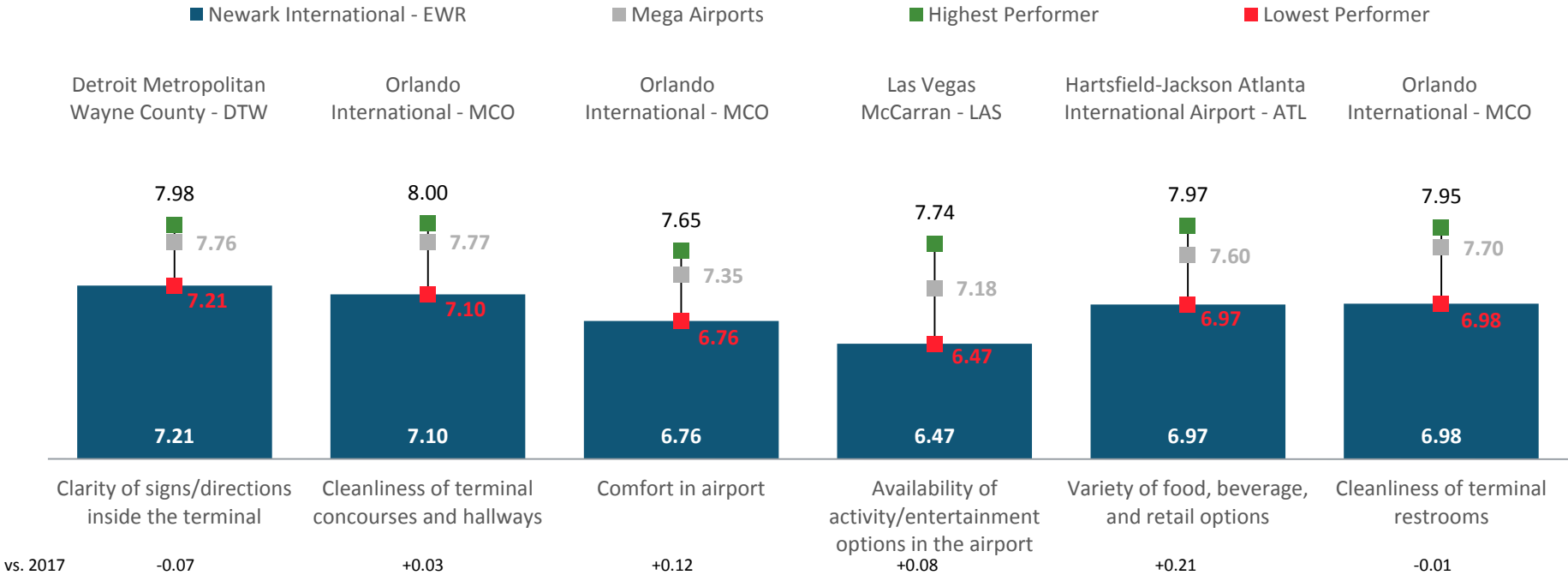
Change vs
2017



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Terminal Facilities

Attribute Performance

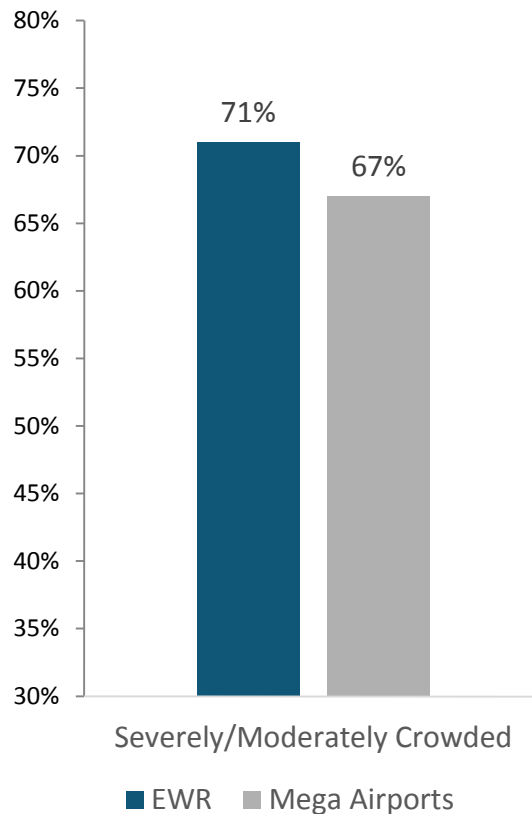


Terminal Facilities

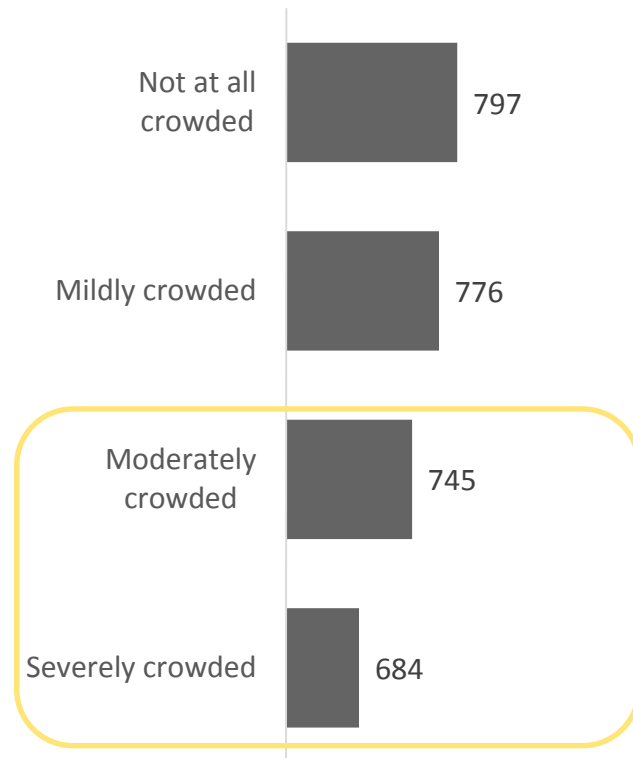
Terminal Facilities satisfaction declines when terminals are perceived as crowded

EWR is seen as slightly more crowded than the average mega airport.

Crowd Within the Airport Terminal



Terminal Facilities Index by Crowding – Total Industry



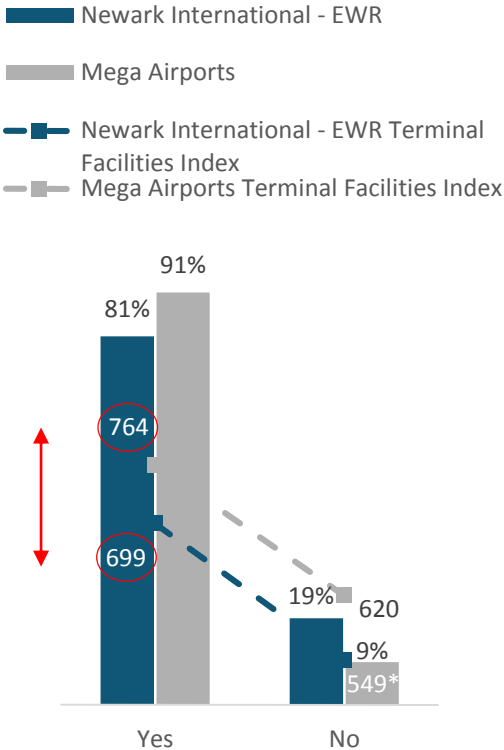
Terminal Facilities

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

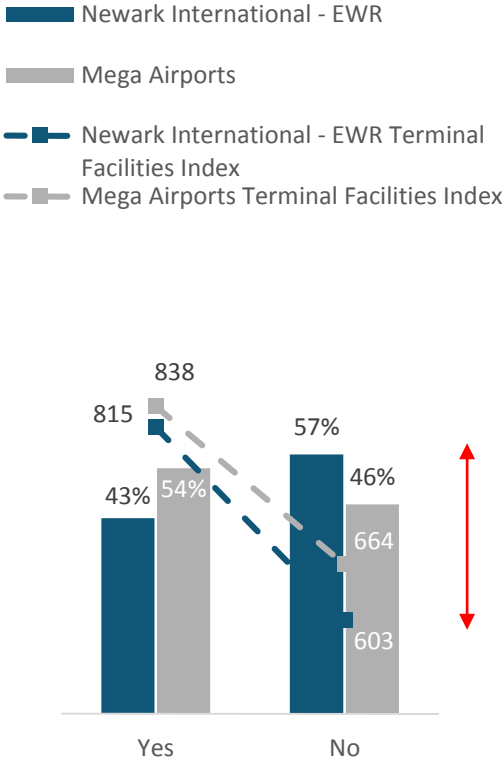
Restroom cleanliness and having clear and adequate signage are two of the most impactful KPIs in the 2018 Airport Satisfaction Study.

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

Restroom Cleanliness



Signage Adequate and Easy to Understand

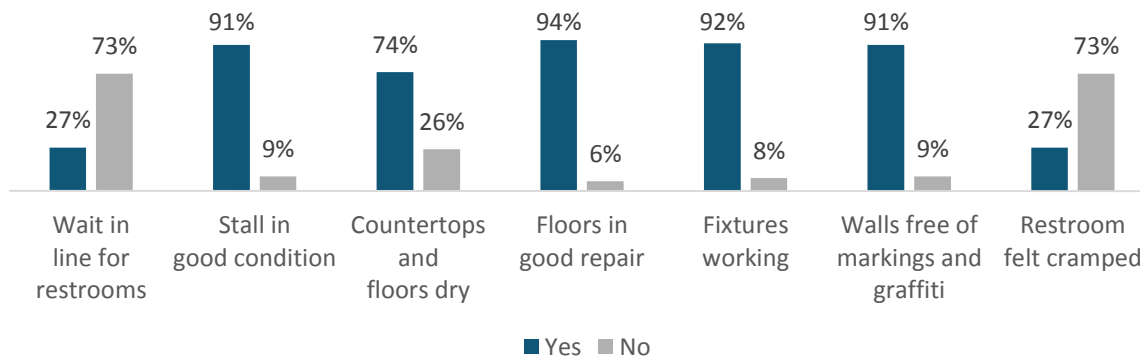


Terminal Facilities

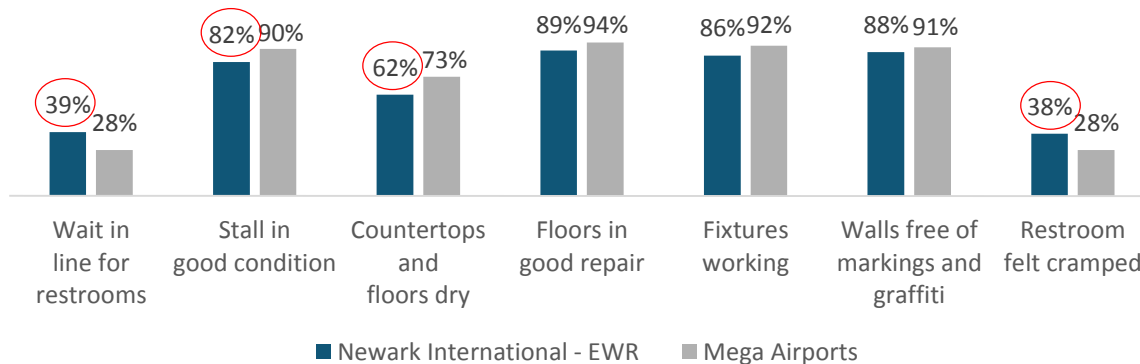
Restroom condition impacts perceptions of cleanliness substantially

Having to wait in line for restrooms and countertops and floors being dry are the two components with the biggest gaps to the Mega airport average

Restroom Clean % Yes by Restroom Components – Total Industry



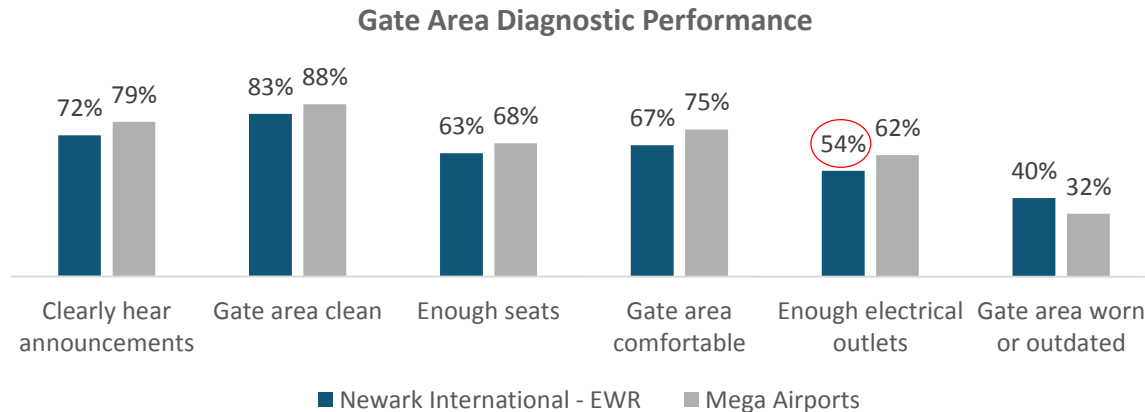
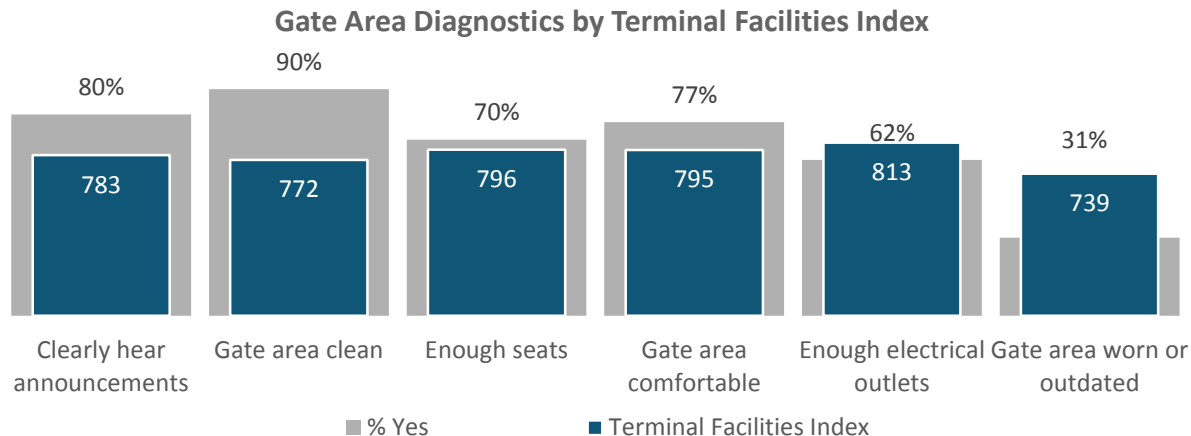
Restroom Components - % Yes



Terminal Facilities

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

Gate area comfortable, Enough electrical outlets and Gate area worn or outdated are the areas with the biggest gaps compared two other Mega airports.



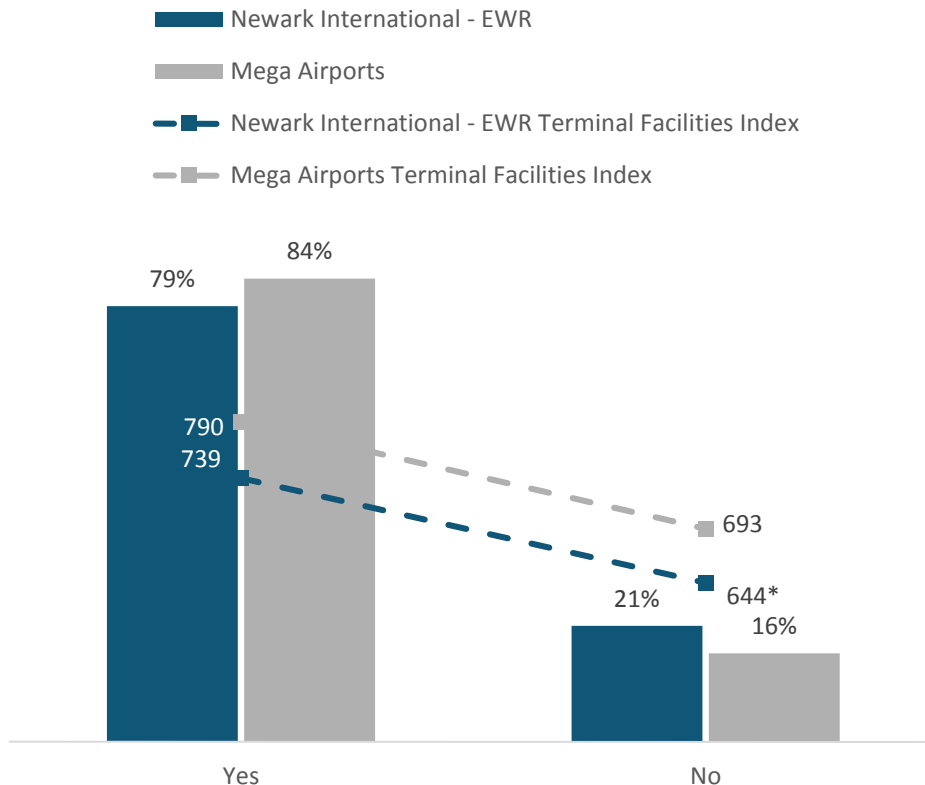
Terminal Facilities

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

While 84% of mega airport passengers state the Wi-Fi was faster than or as fast as expected, only 79% of EWR passengers state the same.

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

Wi-Fi Connection Faster Than or As Expected





Baggage Claim

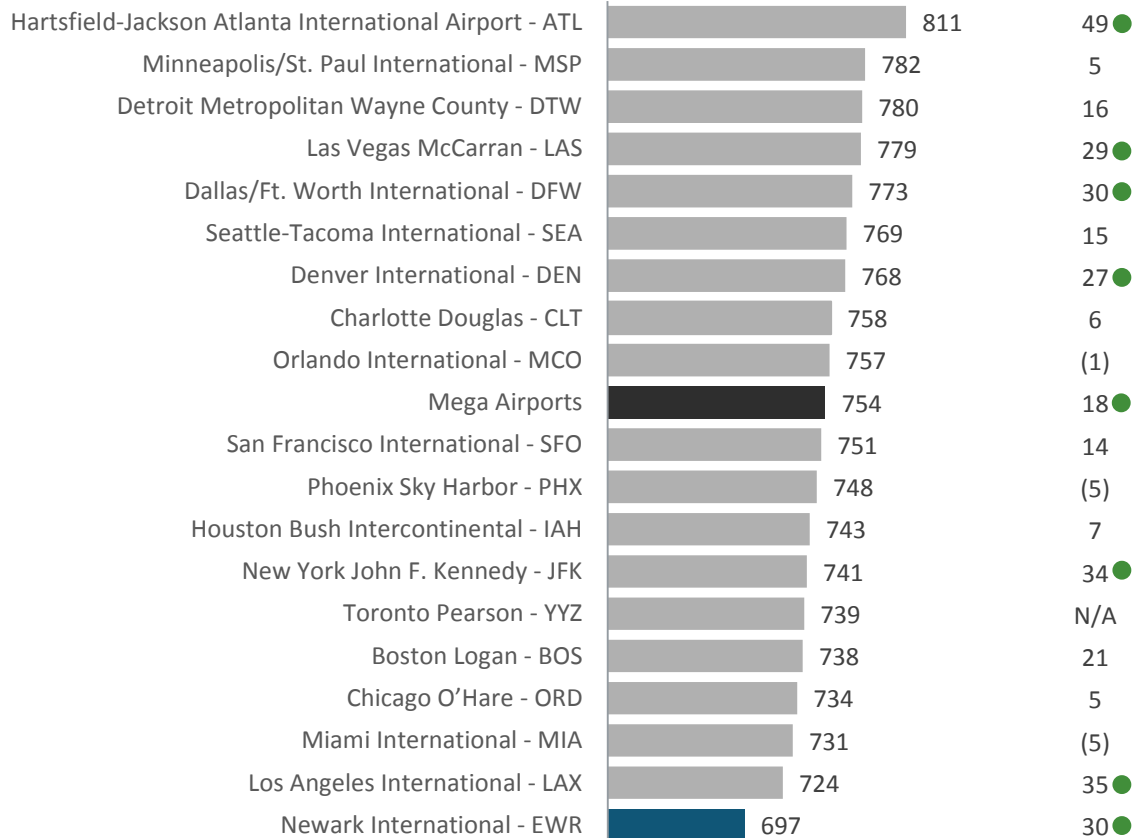
Baggage Claim Satisfaction

EWR significantly improves 30 points year over year in Baggage Claim Satisfaction, ranking 19th

The mega airport average also improves significantly – by 30 points.

Baggage Claim Satisfaction Index: Mega Airports

Change vs
2017



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Baggage Claim

Attribute Performance

■ Newark International - EWR

■ Mega Airports

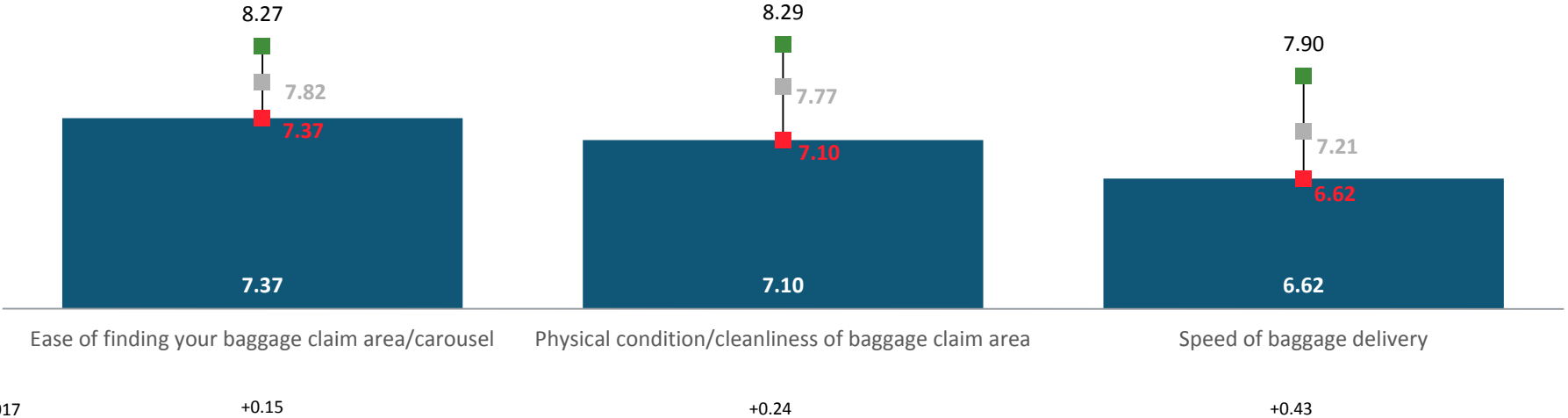
■ Highest Performer

■ Lowest Performer

Hartsfield-Jackson Atlanta
International Airport - ATL

Hartsfield-Jackson Atlanta
International Airport - ATL

Hartsfield-Jackson Atlanta
International Airport - ATL

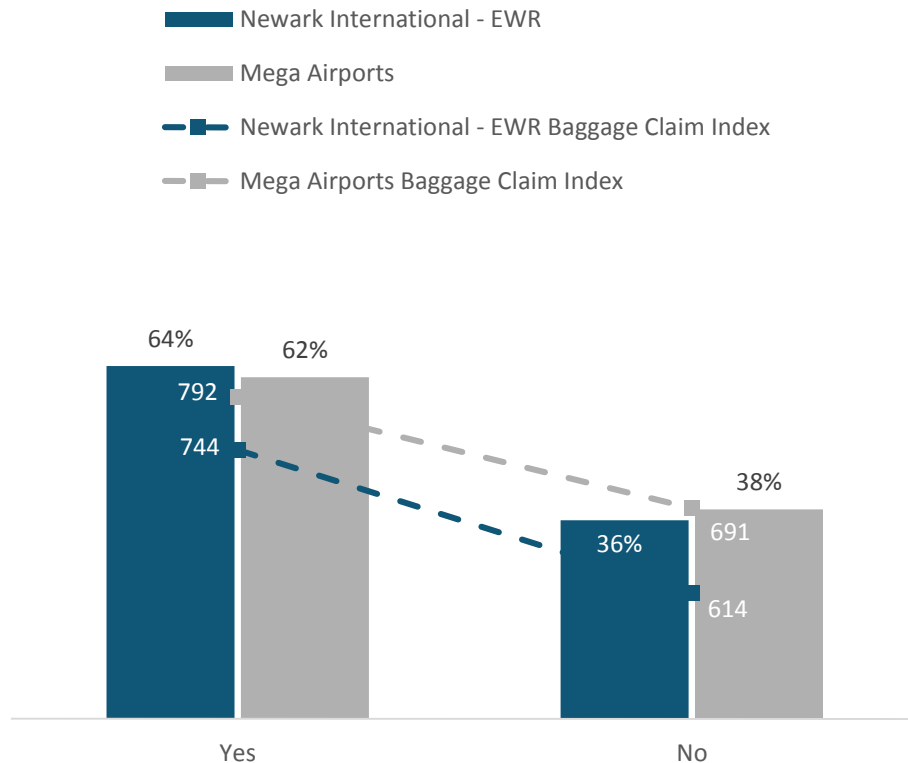


Baggage Claim

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

EWR is in line with the Mega airport average in the percent of passengers waiting 15 minutes or less for their baggage

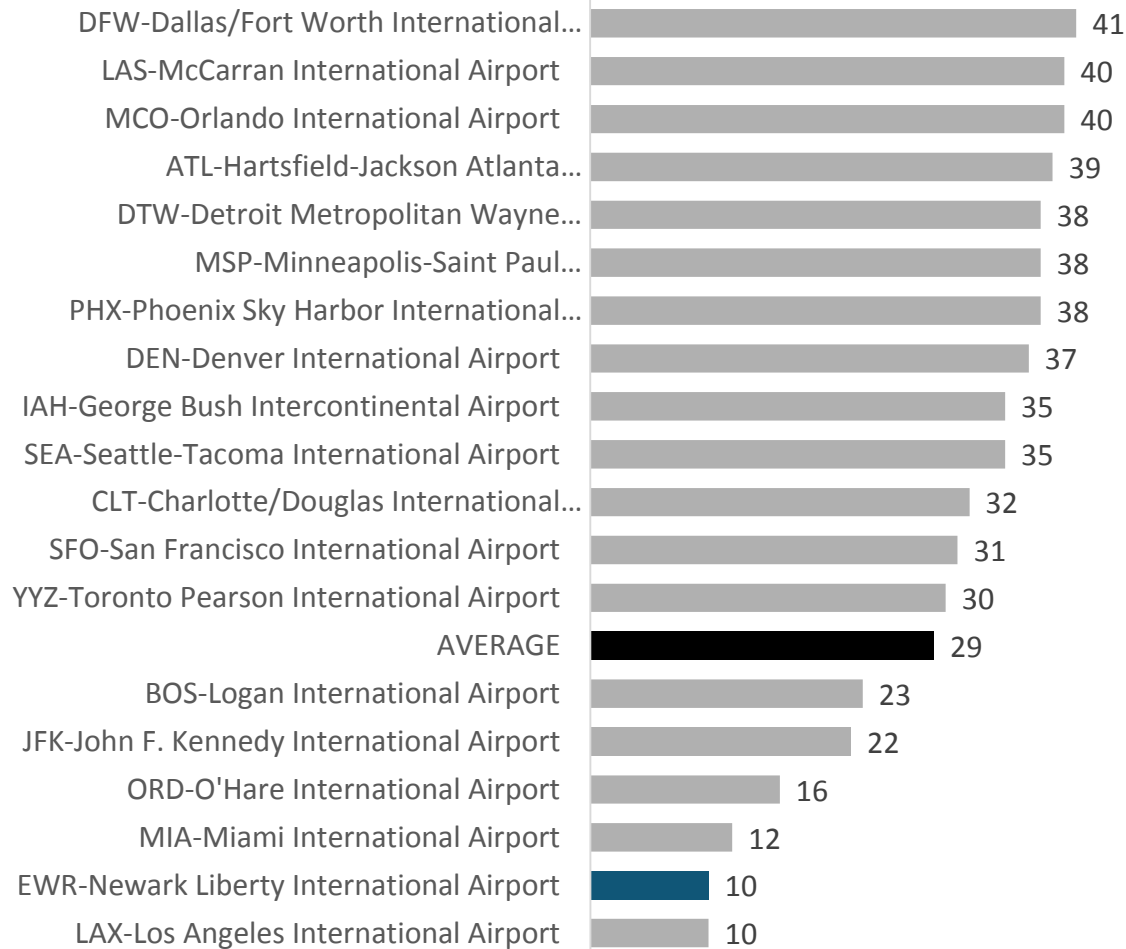
Waited Less than 16 Minutes in Baggage Claim Area for Baggage Claim





NPS Scores – Mega Airport Segment

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



J.D. POWER

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

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