



J.D. POWER

2018 North America Airport Satisfaction (NAASS) StudySM

Methodology

Global Travel and Hospitality Practice

September 2018

Study Objectives

The *J.D. Power 2018 North America Airport Satisfaction (NAASS) StudySM* is a syndicated benchmarking study profiling the experiences of customers from Airports in North America. This research details the importance and impact of the overall customer experience on satisfaction.

To measure customer satisfaction, critical-to-customer experience factors are examined using an index model. The model identifies the dominant factors that impact customer satisfaction and behavior for the industry and provides a benchmark of excellence for each. The study measures overall customer satisfaction based on performance in six factors (in alphabetical order): Airport Accessibility; Baggage Claim; Check-in/Baggage Check; Food, Beverage, and Retail; Security Check; and Terminal Facilities.

The objectives of this study are to:

- Benchmark mega, large, and medium size North America airports on overall experience, as well as the components of that experience that include the surrounding infrastructure that enables travel to and from the airport
- Identify specific opportunities for improving the airport experience
- Identify insights on trends in consumer behaviors and expectations

Research Methodology

The *2018 North America Airport Satisfaction (NAASS) Study* utilizes a segmented methodology. A segmented methodology helps to address airport's needs for market-specific insights with an enhanced sampling structure to provide benchmarks in three key segments. The three segments are (in alphabetical order):

- Large
- Medium
- Mega

Data was collected using an online methodology via three consumer panel sources. The 2018 study collected a total of 40,183 completed surveys.

Fielding Periods:

- Wave 1: October, 2017
- Wave 2: January, 2018
- Wave 3: April, 2018
- Wave 4: July, 2018

An initial screening was conducted to ensure that respondents met the following criteria:

- 18 years of age or older
- Resident of the United States
- Traveled through at least one domestic airport, with both departure and arrival experiences (including connecting airports) in the past 3 months
- Had an originating airport within the United States

Qualifying respondents continued with the survey and were asked to identify up to four domestic airports they traveled through during the past 3 months. If travel was only within North America, respondents must have traveled through at least one qualifying mega, large, or medium airport to participate. From the airports identified, one qualifying experience was selected for the respondent to evaluate using least bucket fill methodology.

Study Completes- Large Airports

| Large Airports | 2018 Study Completes |
|--|-------------------------|
| Austin-Bergstrom International Airport | 482 |
| Baltimore-Washington International Thurgood Marshall Airport | 500 |
| Calgary International Airport | 493 |
| Chicago Midway International Airport | 500 |
| Dallas Love Field | 500 |
| Fort Lauderdale-Hollywood International Airport | 500 |
| Honolulu International Airport | 496 |
| John Wayne Airport | 500 |
| Kansas City International Airport | 497 |
| LaGuardia Airport | 500 |
| Lambert-St. Louis International Airport | 500 |
| Louis Armstrong New Orleans International Airport | 500 |
| Montréal-Pierre Elliott Trudeau International Airport | 496 |
| Nashville International Airport | 500 |
| Oakland International Airport | 484 |
| Philadelphia International Airport | 501 |
| Portland International Airport | 500 |
| Ronald Reagan Washington National Airport | 499 |
| Salt Lake City International Airport | 499 |
| San Diego International Airport | 502 |
| Tampa International Airport | 504 |
| Vancouver International Airport | 500 |
| Washington Dulles International Airport | 494 |
| William P. Hobby Airport | 468 |
| Total | 11,915 |

Study Completes- Medium Airports

| Medium Airports | 2018 Study Completes |
|--|-------------------------|
| Albuquerque International Sunport | 284 |
| Bradley International Airport | 301 |
| Buffalo Niagara International Airport | 301 |
| Cincinnati/Northern Kentucky International Airport | 301 |
| Cleveland Hopkins International Airport | 301 |
| Eppley Airfield | 295 |
| General Mitchell International Airport | 301 |
| Hollywood Burbank Airport (formerly Bob Hope Airport) | 300 |
| Indianapolis International Airport | 300 |
| Jacksonville International Airport | 300 |
| John Glenn Columbus International Airport (formerly Port Columbus) | 300 |
| Kahului Airport | 293 |
| Ontario International Airport | 299 |
| Palm Beach International Airport | 300 |
| Pittsburgh International Airport | 300 |
| Raleigh-Durham International Airport | 300 |
| Sacramento International Airport | 302 |
| San Antonio International Airport | 300 |
| San Jose International Airport | 299 |
| Southwest Florida International Airport | 300 |
| Ted Stevens Anchorage International Airport | 299 |
| Total | 6,276 |

Study Completes- Mega Airports

| Mega Airports | 2018 Study Completes |
|---|-------------------------|
| Charlotte/Douglas International Airport | 1206 |
| Dallas/Fort Worth International Airport | 1529 |
| Denver International Airport | 1329 |
| Detroit Metropolitan Wayne County Airport | 1000 |
| George Bush Intercontinental Airport | 931 |
| Hartsfield-Jackson Atlanta International Airport | 1602 |
| John F. Kennedy International Airport | 1231 |
| Logan International Airport | 842 |
| Los Angeles International Airport | 1359 |
| McCarran International Airport | 953 |
| Miami International Airport | 986 |
| Minneapolis-Saint Paul International Airport/Wold-Chamberlain | 1015 |
| Newark Liberty International Airport | 978 |
| O'Hare International Airport | 1502 |
| Orlando International Airport | 1024 |
| Phoenix Sky Harbor International Airport | 1108 |
| San Francisco International Airport | 1100 |
| Seattle-Tacoma International Airport | 1130 |
| Toronto Pearson International Airport | 1167 |
| Total | 21,992 |

Market Share/Weighting Scheme and Award Criteria

Market Share and Weighting Scheme

To provide a more accurate portrayal of the airport industry, responses were weighted by each airport's market share based on total number of passengers in 2017.

Market share data is based on findings issued by Annual World Traffic Report 2017.

Award Criteria

To be reported and ranked in this study, an airport must be defined as a mega, large, or medium U.S. hub by the Annual World Airport Traffic Report 2017. Airports receiving 100 or more completed surveys are eligible to be included in the rankings for the 2018 study award.

The airport with the highest overall index score within a single segment and at least 100 completed surveys in their segment receives the award for that segment.

Index Model

For more information about J.D. Power's index and benchmarks, please visit jdpower.com/about-us/about-our-industry-benchmarks.

North America Airport Satisfaction Index Model



Note: Values may not add up to 100% due to rounding.

North America Airport Satisfaction Index Model

| Index Model Composition Overall | Total Industry Index Model |
|---|----------------------------|
| Sample Size | 40,183 |
| Terminal Facilities | 37% |
| Clarity of signs/directions inside the terminal | 21% |
| Comfort in airport (e.g., seating, roominess, etc.) | 20% |
| Cleanliness of terminal restrooms | 16% |
| Cleanliness of terminal | 16% |
| Variety of food, beverage, and retail options | 15% |
| Availability of activity/entertainment options in the airport | 12% |
| Airport Accessibility | 14% |
| Attractiveness of airport grounds | 18% |
| Clarity of signs/directions | 18% |
| Convenience of transportation | 17% |
| Traffic flow on airport grounds | 17% |
| Ease of leaving terminal | 15% |
| Ease of arriving at the terminal | 14% |
| Security Check | 14% |
| Amount of time required for security check | 37% |
| Professionalism of security staff | 33% |
| Ability of security process to make you feel safe | 30% |

Notes: Values may not total 100% due to rounding; Table reflects effective impact of primary factors on overall experience for total industry

North America Airport Satisfaction Index Model (continued)

| Index Model Composition Overall | Total Industry Index Model |
|--|----------------------------|
| Food, Beverage, and Retail | 13% |
| Baggage Claim | 11% |
| Speed of baggage delivery | 44% |
| Ease of finding your baggage claim area/carousel | 29% |
| Physical condition/cleanliness of baggage claim area | 27% |
| Check-in/Baggage Check | 10% |
| Traffic flow at check-in/baggage check area | 40% |
| Ease of finding check-in/baggage check location | 31% |
| Cleanliness of the check-in/baggage check area | 29% |

Notes: Values may not total 100% due to rounding; Table reflects effective impact of primary factors on overall experience for total industry