



Airport Performance Report

First Quarter 2018

Topline PANYNJ Terminal Results

May 18, 2018

A Customer Experience Presentation

2018 ACI-ASQ Study Objectives

- ➔ Provide a Customer Satisfaction Evaluation of the airport environment and services provided while customers are at the airport.
- ➔ Provide a Benchmark Comparison for PA Airports to gauge our performance relative to the airport industry.
- ➔ 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 guidance for marketing, planning, investment and service initiatives.

Methodology at a Glance

- ➔ **ACI's Airport Service Quality (ASQ) is a monthly benchmarking program aggregated to a quarterly report.**
- ➔ **More than 300 airports worldwide participate 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.



PA Terminal Satisfaction Performance

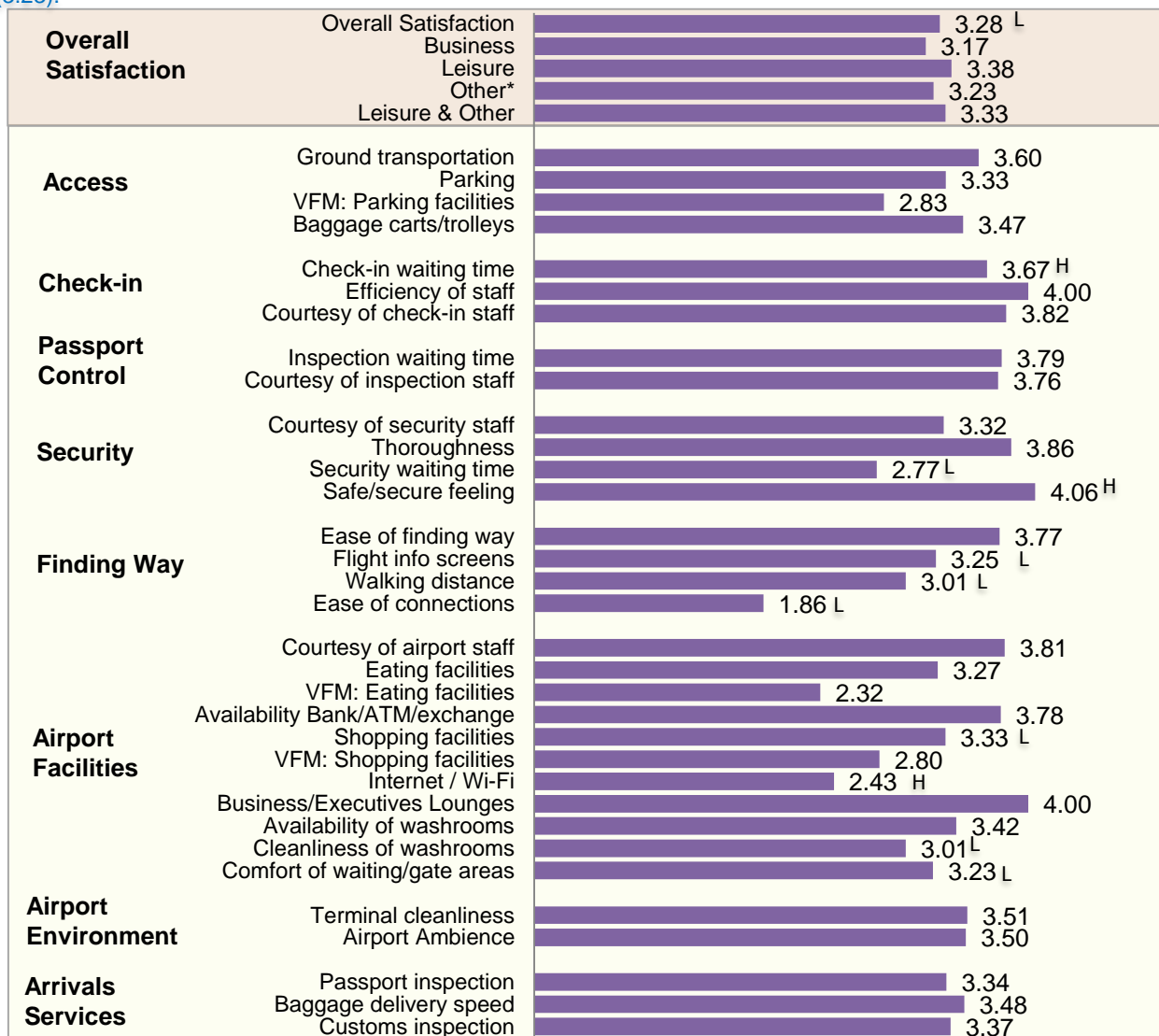
The Satisfaction Rating Attributes

Overall Satisfaction		
Access	Ground transportation: Parking: VFM: Parking facilities: Baggage carts/trolleys:	Ground transportation to/from airport Parking facilities Value for the money of parking facilities Availability of baggage carts/trolleys
Check-in	Check-in waiting time: Efficiency of staff: Courtesy of check-in staff:	Waiting time in check-in queue/line Efficiency of check-in staff Courtesy and helpfulness of check-in staff
Passport Control	Inspection waiting time: Courtesy of inspection staff:	Waiting time at passport/personal ID inspection Courtesy and helpfulness of inspection staff
Security	Courtesy of security staff: Thoroughness: Security waiting time: Safe/secure feeling:	Courtesy and helpfulness of security staff Thoroughness of security inspection Waiting time at security inspection Feeling of being safe and secure
Finding Way	Ease of finding way: Flight info screens: Walking distance: Ease of connections:	Ease of finding your way through airport Flight information screens Walking distance inside the terminal Ease of making connections with other flights
Airport Facilities	Courtesy of airport staff: Eating facilities: VFM: Eating facilities: Availability Bank/ATM/exchange: Shopping facilities: VFM: Shopping facilities: Internet / Wi-Fi: Business/Executives Lounges: Availability of washrooms: Cleanliness of washrooms: Comfort of waiting/gate areas:	Courtesy and helpfulness of airport staff (excluding check-in, passport control and security) Restaurant/Eating facilities Value for the money of restaurant/eating facilities Availability of bank/ATM facilities/money changers Shopping facilities Value for the money of shopping facilities Internet access/Wi-Fi Business/Executive lounges Availability of washrooms/toilets Cleanliness of washrooms/toilets Comfort of waiting/gate areas
Airport Environment	Terminal cleanliness: Airport Ambience:	Cleanliness of airport terminal Ambience of the airport
Arrivals Services	Passport inspection: Baggage delivery speed: Customs inspection:	Passport/Personal ID inspection Speed of baggage delivery service Customs inspection

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

JFK T1 Performance

- Overall passenger satisfaction declined significantly since 4th Qtr. 2017. Satisfaction with most terminal elements remained stable, while check-in wait-time (3.67) improved significantly, as did safe/secure feeling (4.06)—the highest scoring item, and Internet/WiFi (2.43). Some terminal elements lost significant ground, such as security check wait-time (2.77), wayfinding (walking distance-3.01, FIDS-3.25 and ease of connections-1.86—the lowest scoring item), restroom cleanliness (3.01) and availability (3.42), and comfort of the gate area (3.23).



Compared to busin. travelers, leisure travelers rate T1 higher on:

- Ease of connections (2.04)
 - Passport inspection (3.34)
 - Customs inspection (3.66)
- Lower on:
- Eating facilities VFM (2.18)

Compared to connectors, local O-D pax. rate T1 higher on:

- Overall satisfaction (3.51)
 - FIDS (3.58)
 - Walking distance (3.75)
 - Shopping facilities VFM (3.07)
 - Gate area comfort (3.46)
 - Terminal cleanliness (3.74)
- Lower on:
- Eating facilities (2.98)

Compared to U.S. residents, int'l residents rate T1 higher on:

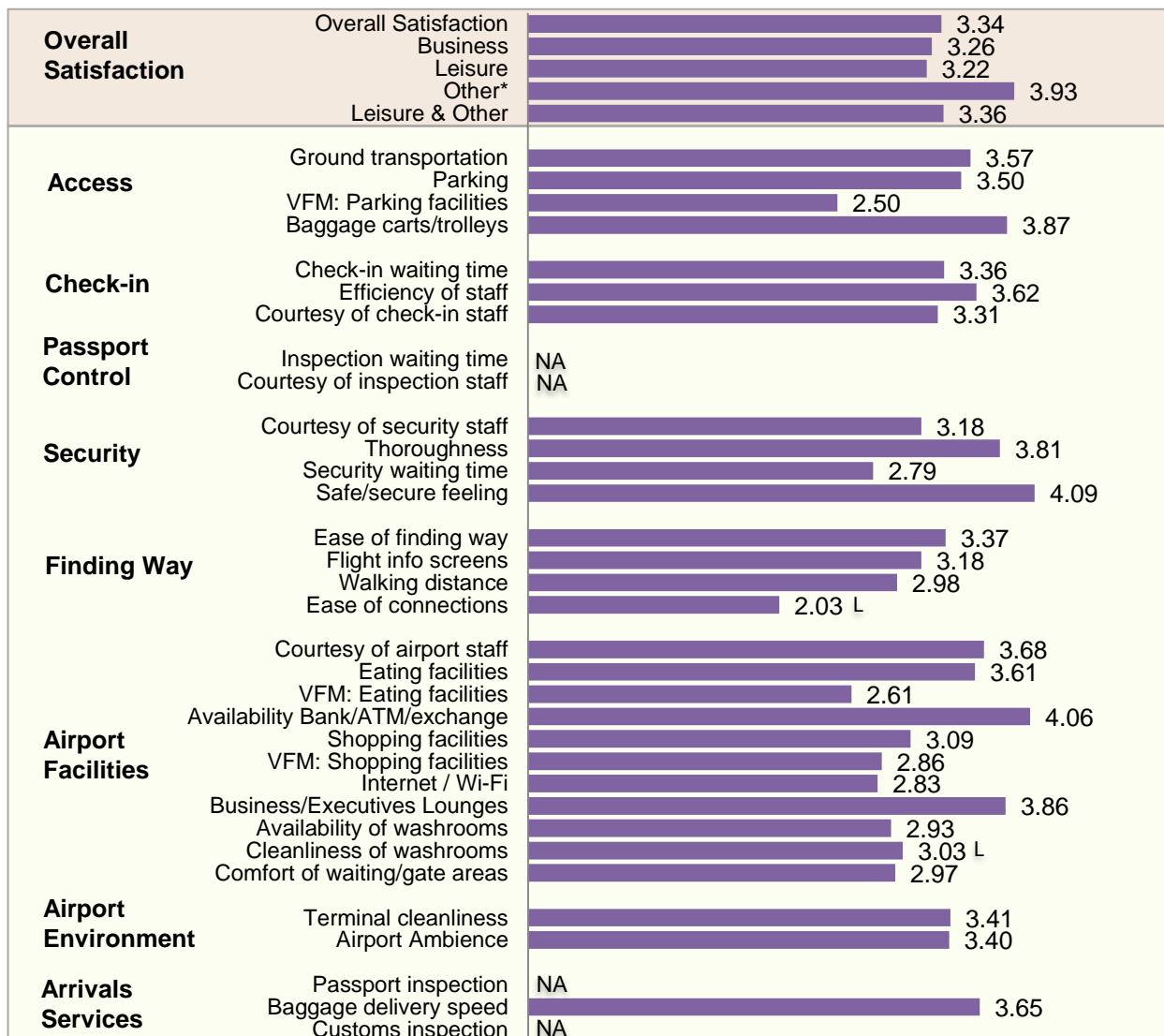
- Check-in wait time (4.16)
 - Check-in staff efficiency (4.23)
 - Check-in staff courtesy (4.16)
 - TSA courtesy (3.50)
 - Sec. Chk. wait time (3.13)
 - FIDS (3.53)
 - Walking distance (3.39)
 - Gate area comfort (3.42)
 - Terminal cleanliness (3.41)
- Lower on:
- Arr. Passport inspection (3.18)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=125 Passengers.

JFK T2 Performance



- Satisfaction remained stable overall and on nearly all terminal elements, except for a significant decline in ease of connections (2.03) since 4th Qtr. 2017 (also the lowest scoring item) and restroom cleanliness (3.03). Safe/secure feeling (4.09) was the highest scoring item.



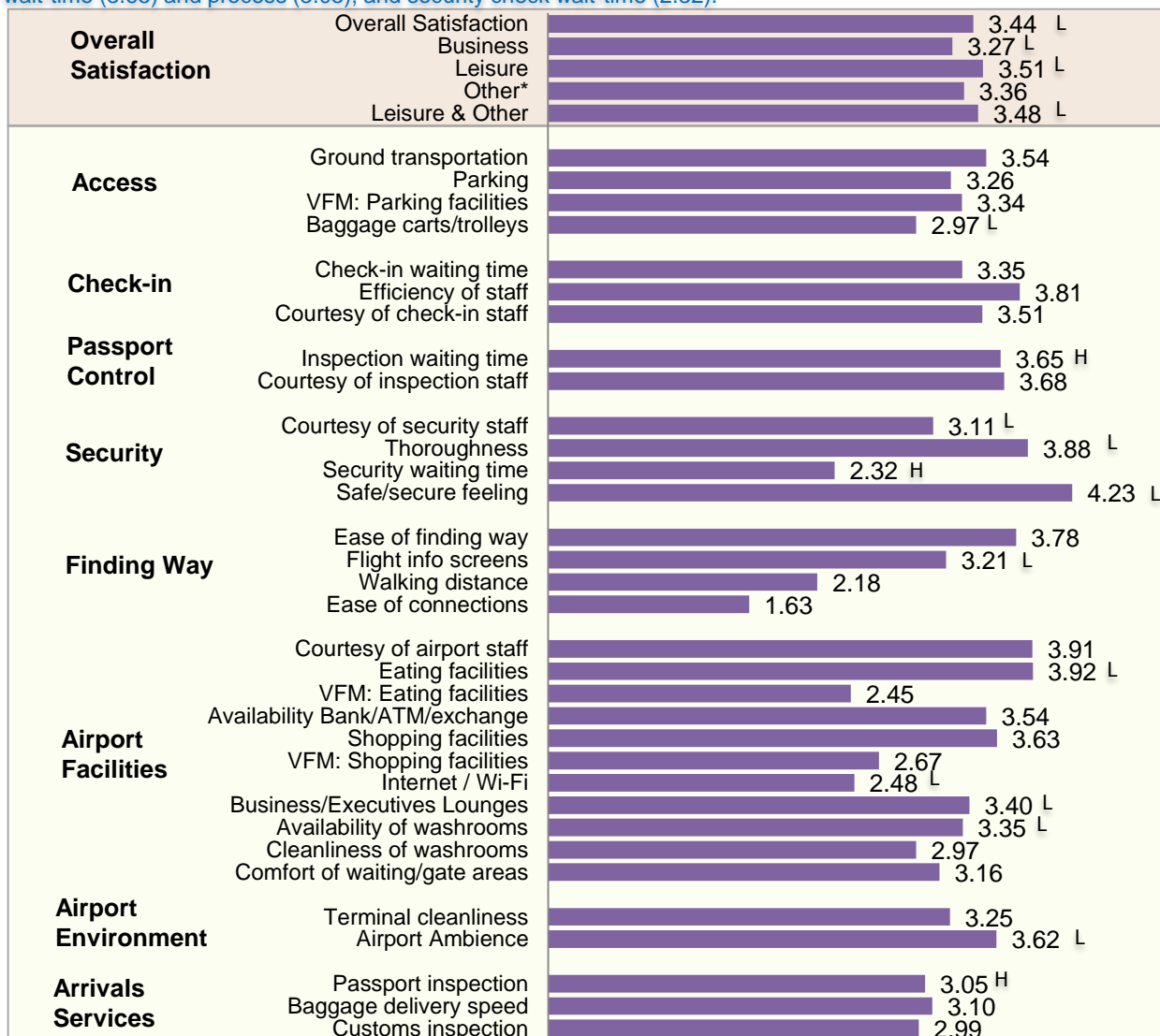
Compared to connectors, local
O-D pax. rate T2 higher on:
 -- Overall satisfaction (3.58)
 -- Sec. Chk. wait-time (3.25)
 -- FIDS (3.65)
 -- Walking distance (3.46)
 -- Shopping facilities VFM (3.07)
 -- Gate area comfort (3.27)
Lower on:
 -- Busin./exec. lounges (3.64)

Compared to men, women rate
T2 lower on:
 -- Parking facilities (3.00)
 -- Parking facilities VFM (1.67)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=104 Passengers.

JFK T4 Performance

- Satisfaction decreased significantly overall and on many terminal elements, including the security checkpoint (e.g., baggage carts (2.97), TSA courtesy (3.11) and thoroughness (3.88), safe/secure feeling (4.23) – the highest scoring item). Other elements that declines significantly include FIDS (3.21), eating facilities (3.92), Internet/WiFi (2.48), restroom cleanliness (2.97) and availability (3.35), and ambiance (3.62). Ease of connections was the lowest scoring item (1.63). However, T4 improved significantly on FIS passport inspection wait-time (3.65) and process (3.05), and security check wait-time (2.32).



Compared to business travelers, leisure travelers rate T4 higher on:

- Overall satisfaction (3.48)
- TSA courtesy (3.16)
- Personal safety (4.28)
- Airport staff courtesy (4.06)
- Restroom availability (3.38)
- Terminal ambiance (3.68)
- Arr. Baggage speed (3.15)

Lower on:

- Parking facilities (2.00)
- Eating Places VFM (2.39)

Compared to U.S. residents, int'l residents rate T4 higher on:

- Overall satisfaction (3.54)
- Check-in wait-time (3.51)
- Check-in staff efficiency (3.94)
- Check-in staff courtesy (3.68)
- TSA courtesy (3.25)
- Sec. Chk. wait-time (2.57)
- Personal safety (4.33)
- FIDS (3.32)
- Walking distance (2.34)
- Airport staff courtesy (4.21)
- Terminal cleanliness (3.37)
- Gate area comfort (3.24)

Lower on:

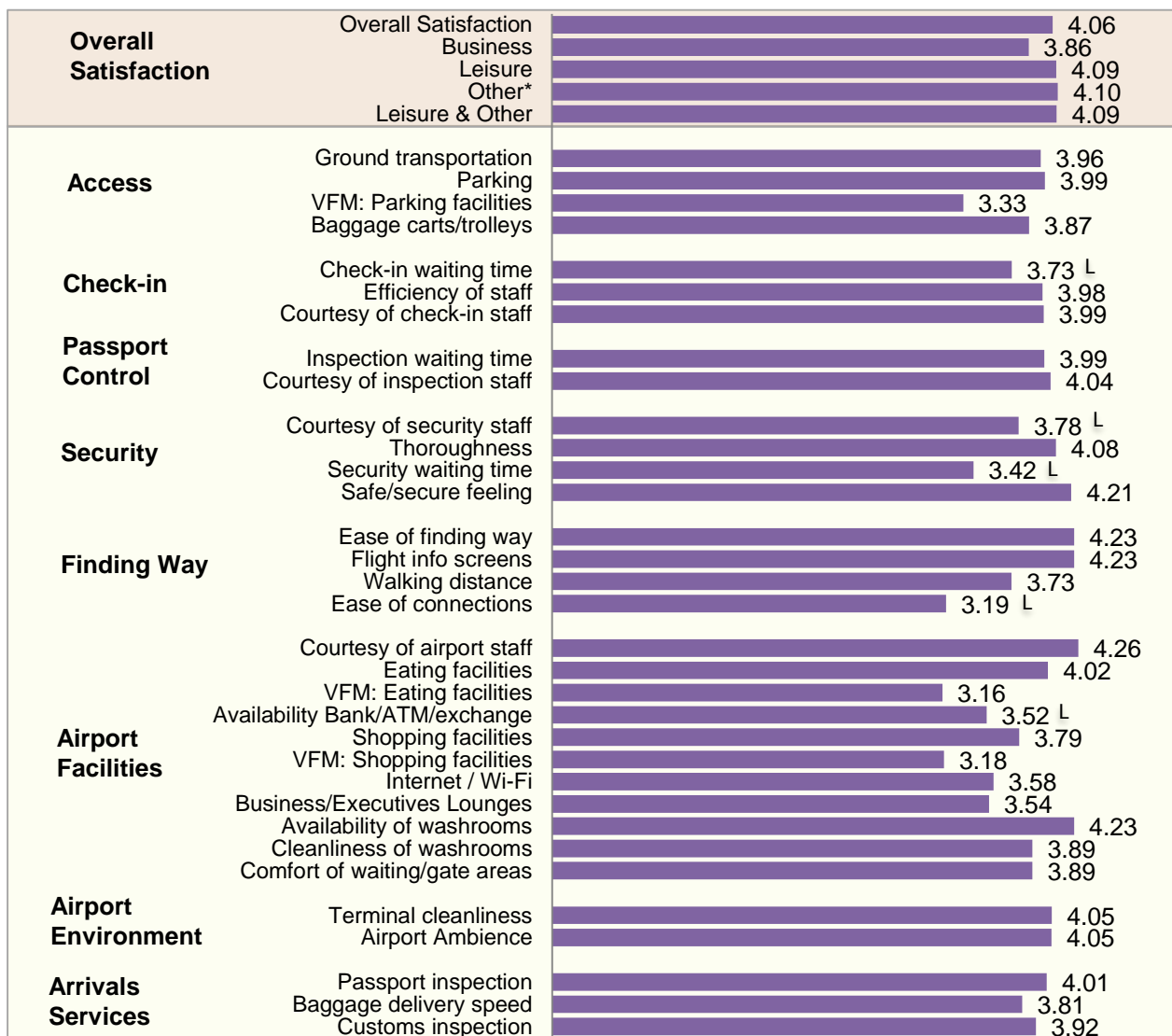
- Ease of connections (1.40)
- Eating facilities VFM (3.88)
- Parking facilities (2.00)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=345 Passengers.

JFK T5 Performance



- Satisfaction remained stable overall and on most terminal elements, while it declined significantly on a few items: check-in wait-time (3.73) and security wait-time (3.42), TSA courtesy (3.78), ease of connections (3.19) and availability of bank/ATM/exchange (3.52). Eating facility value for the money (VFM) was the lowest scoring item (3.16); airport staff courtesy (4.26) was the highest scoring item.



Compared to connectors, local

O-D pax. rate T5 higher on:

- Overall satisfaction (4.17)
- Check-in wait-time (3.97)
- Check-in staff efficiency (4.10)
- Sec. Check wait-time (3.78)
- Wayfinding (4.41)
- FIDS (4.47)
- Walking distance (4.11)
- Eating facilities VFM (3.37)
- Shopping facilities (4.02)
- Shopping facilities VFM (3.45)
- Restroom cleanliness (4.12)
- Gate area comfort (4.10)
- Terminal cleanliness (4.20)
- Terminal ambience (4.15)

Compared to women, men rate

T5 higher on:

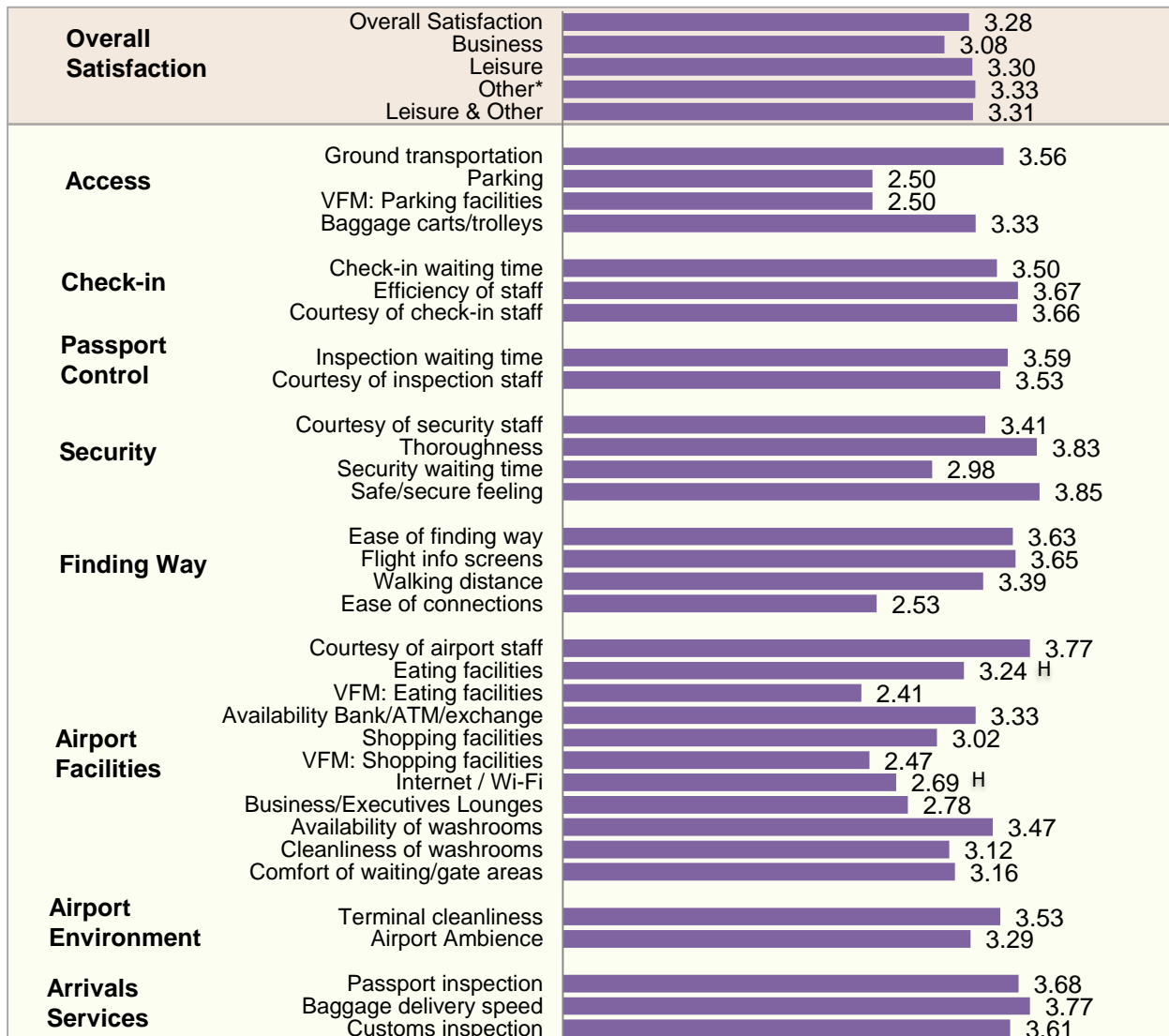
- Check-in staff courtesy (4.25)
- Sec. Check wait-time (3.73)
- FIDS (4.36)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=251 Passengers.

JFK T7 Performance

- Overall satisfaction remained stable overall and on nearly all terminal elements, except for a significant improvement in satisfaction with eating facilities (3.24) and Internet/WiFi (2.69). Eating facility value for the money (VFM) was the lowest scoring item (2.41); safe/secure feeling (3.85) was the highest scoring item.



Compared to connectors, local O-D pax. rate T7 higher on:

- Check-in wait-time (4.06)
- Check-in staff efficiency (3.86)
- Check-in courtesy (3.84)
- TSA courtesy (3.69)
- Sec. Check wait-time (3.38)
- Wayfinding (3.80)
- Walking distance (3.82)

Compared to domestic passengers, international passengers rate T7 higher on:

- Check-in wait-time (3.76)
- TSA courtesy (3.58)
- Sec. Check wait-time (3.36)
- FIDS (3.85)
- Walking distance (3.87)
- Ease of connections (3.70)
- Shopping facilities VFM (2.64)
- Restroom availability (3.65)
- Restroom cleanliness (3.31)

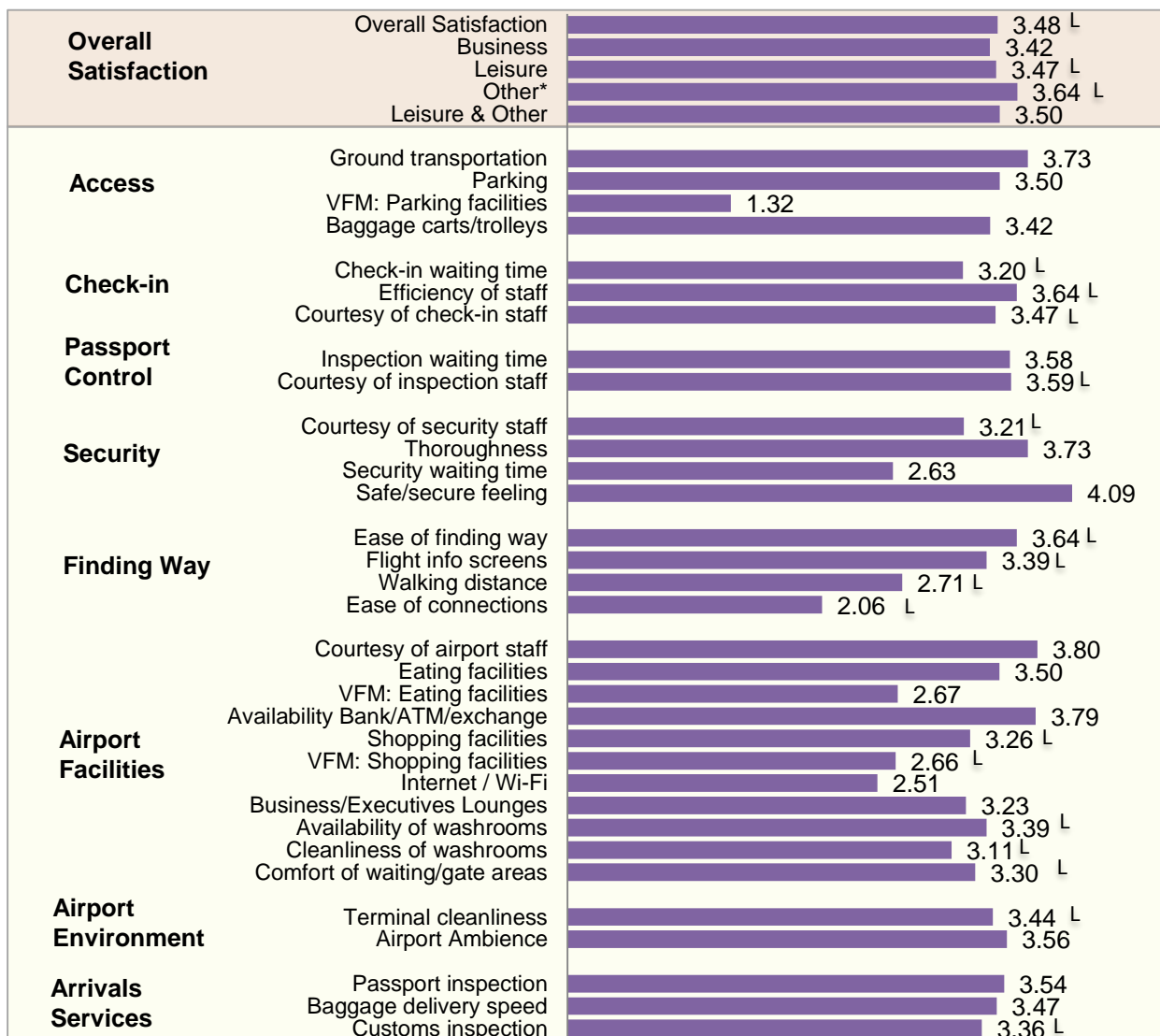
Lower on:

- Personal safety (3.66)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=94 Passengers.

JFK T8 Performance

- Satisfaction declined significantly overall and on many terminal elements, including all check-in elements and all wayfinding elements, TSA courtesy (3.21), security check wait-time (2.63), shopping facilities (3.26) and their VFM (2.66), restroom cleanliness (3.11) and availability (3.39), terminal cleanliness (3.44), comfort of gate area (3.30) and FIS customs inspection (3.36). Parking VFM was the lowest scoring item (1.32); safe/secure feeling (4.09) was the highest scoring item.



Compared to connectors, local O-D pax. rate T8 higher on:

- Overall satisfaction (3.71)
- Check-in wait-time (3.86)
- Check-in staff efficiency (3.99)
- Check-in staff courtesy (3.95)
- Sec. Check wait-time (3.20)
- Wayfinding (4.02)
- FIDS (3.83)
- Walking distance (3.42)
- Eating facilities VFM (2.95)
- Shopping facilities VFM (3.12)
- Restroom availability (3.77)
- Restroom cleanliness (3.41)
- Gate area comfort (3.55)
- Terminal cleanliness (3.77)
- Passport insp. wait-time (3.96)

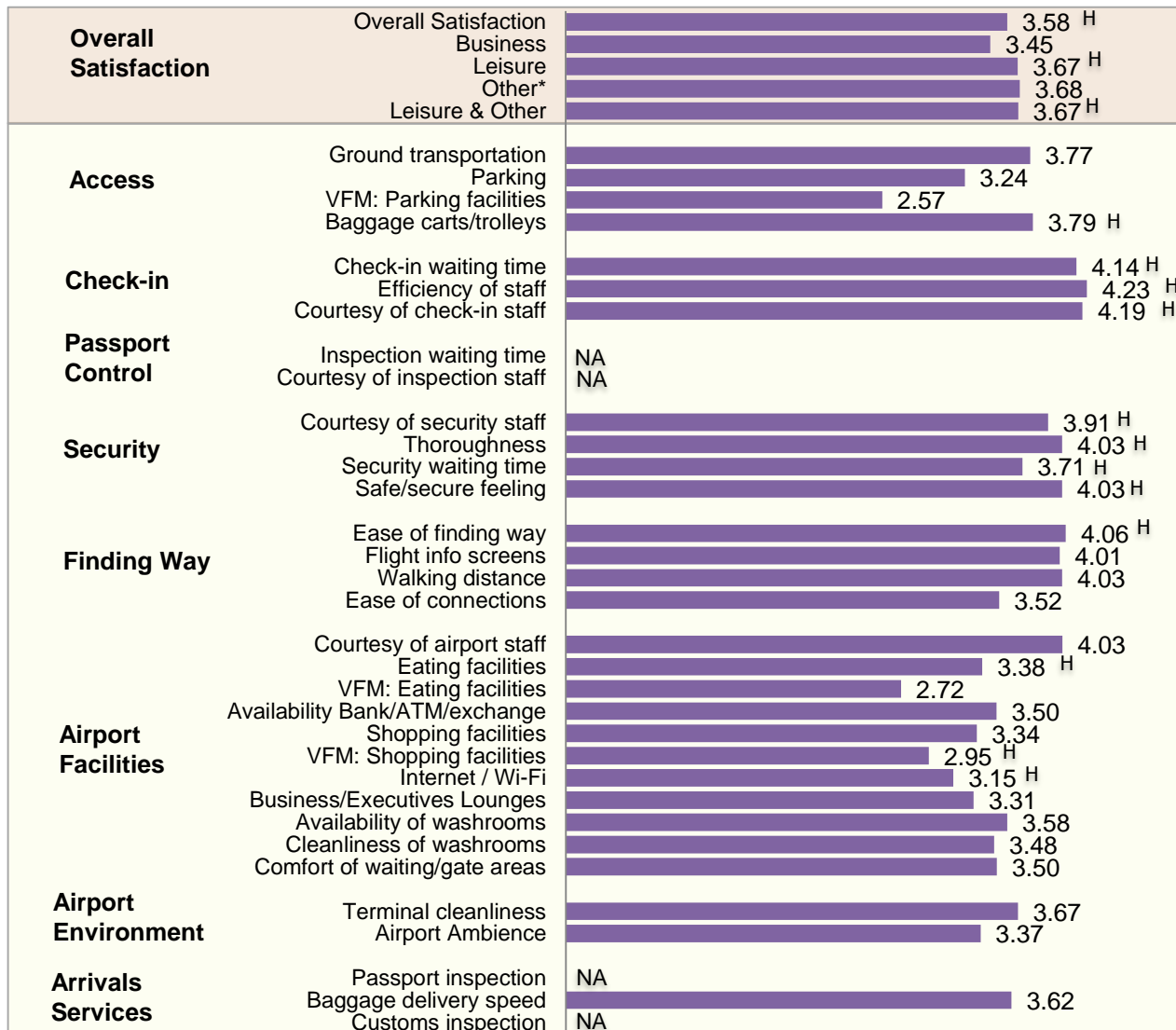
Compared to U.S. residents, int'l residents rate T8 higher on:

- Overall satisfaction (3.91)
- Parking facilities (4.00)
- Check-in wait-time (3.56)
- Check-in staff efficiency (3.86)
- Check-in staff courtesy (3.81)
- Sec. Chk. wait-time (3.24)
- Wayfinding (4.04)
- FIDS (3.80)
- Walking distance (3.56)
- Ease of connections (2.91)
- Eating facilities VFM (3.02)
- Shopping facilities (3.18)
- Restroom availability (3.71)
- Terminal cleanliness (3.85)
- Gate area comfort (3.45)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=168 Passengers.

EWR TA Performance

- EWR TA had many significant improvements in satisfaction with major terminal elements since 4th Qtr. 2017, including check-in (also highest scoring items), security check and airport facilities elements, such as eating facilities (3.38), shopping value for the money (VFM) (2.95) and Internet/WiFi (3.15). The lowest scoring item was value for the money of parking facilities (2.57).



Compared to business travelers, leisure travelers rate TA higher on:

- Check-in wait-time (4.28)
- Check-in staff efficiency (4.34)
- Check-in staff courtesy (4.33)
- Terminal ambience (3.51)

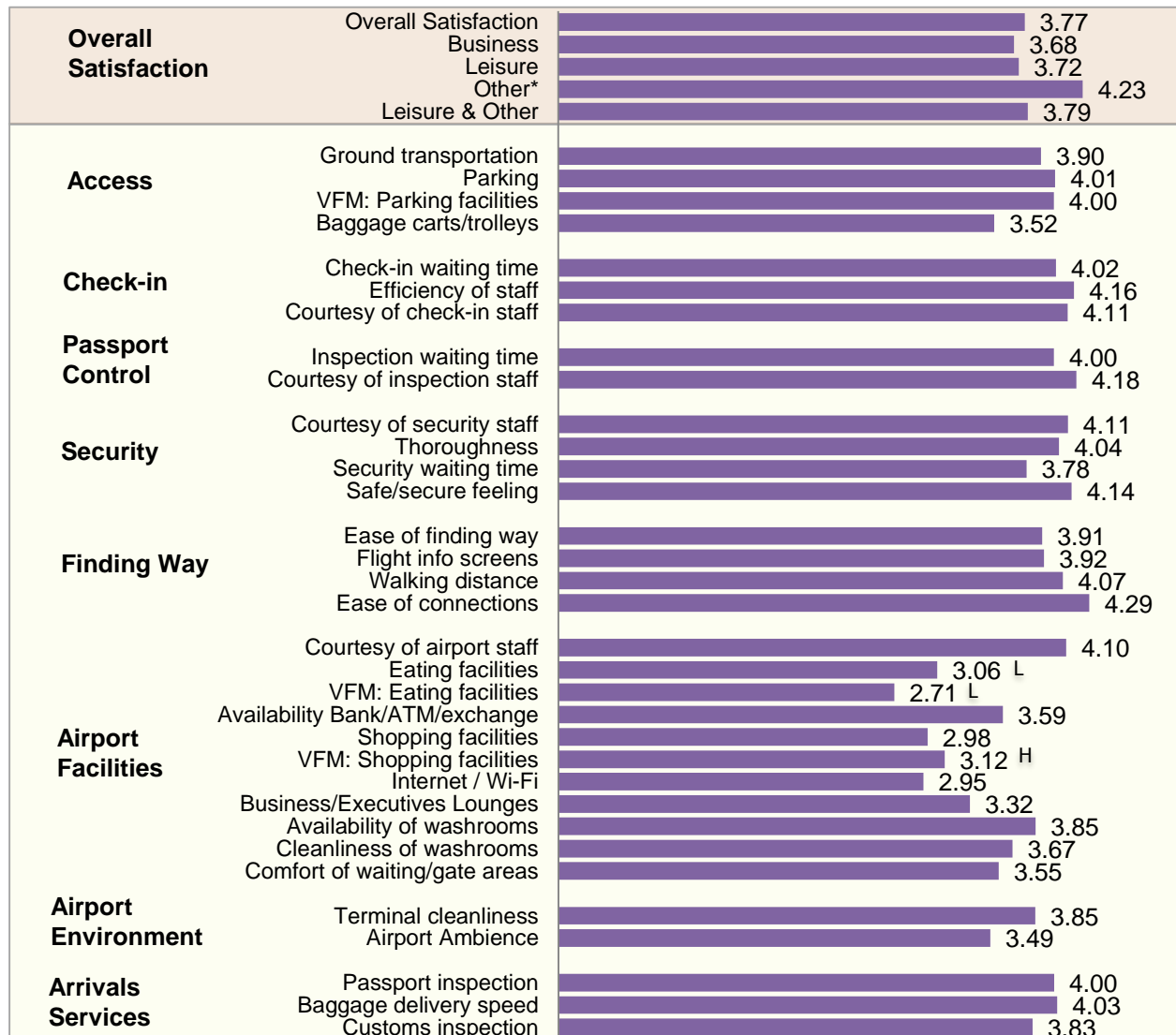
Compared to U.S. residents, int'l residents rate TA higher on:

- Speed of Baggage (4.38)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=209 Passengers.

EWR TB Performance

- TB satisfaction remained stable overall and on nearly all terminal elements, although it improved significantly on shopping value for the money (VFM)-3.12, but declined significantly on eating facilities value for the money (2.71)—also the lowest scoring item,



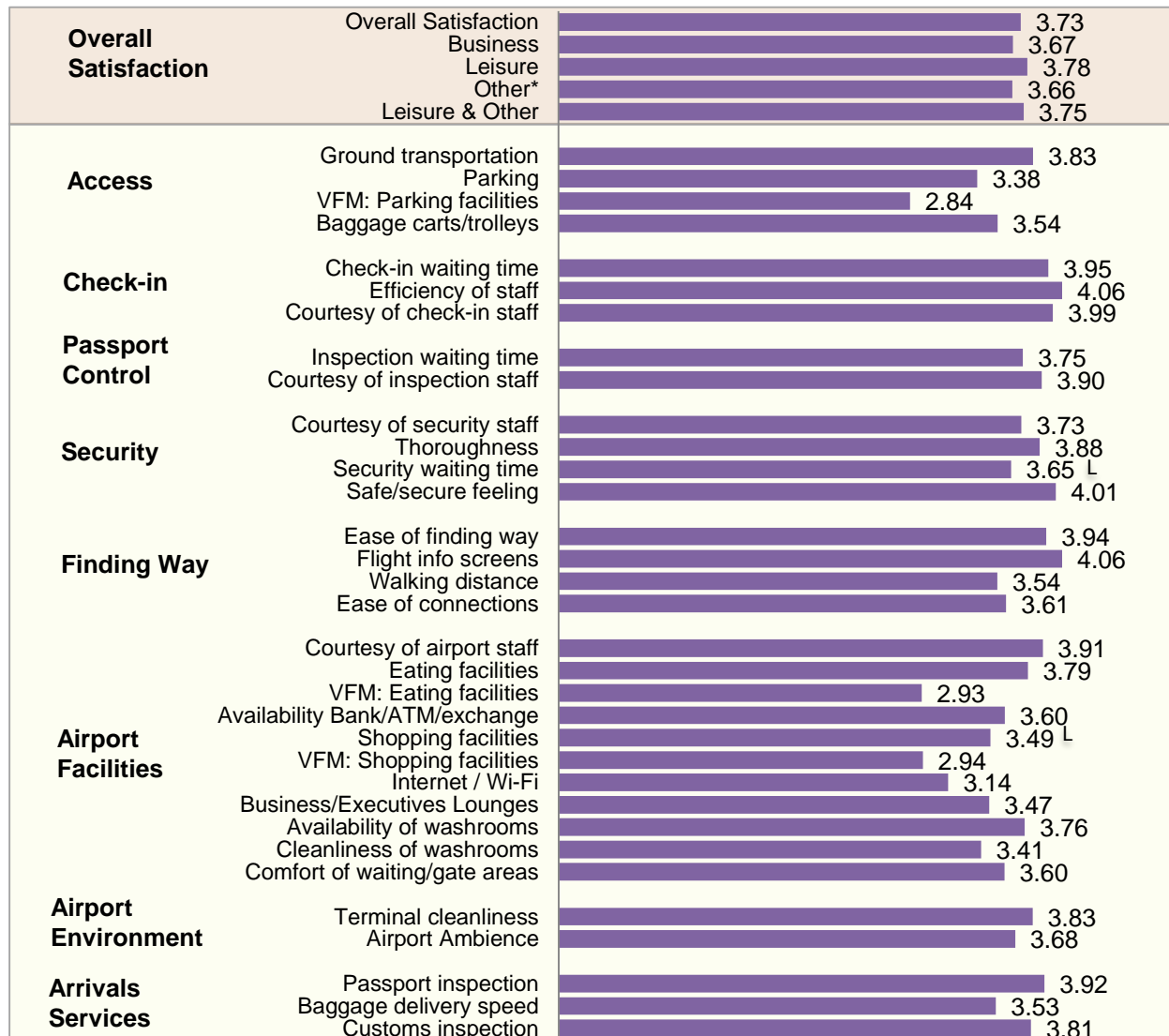
Compared to international passengers, domestic passengers rate TB higher on:

- Overall satisfaction (4.10)
- Check-in staff courtesy (4.44)
- Thorough Sec. Chk. (4.32)
- Sec. Check wait-time (4.10)
- Personal safety (4.47)
- Airport staff courtesy (4.50)
- Shopping facilities (3.56)
- Busin./exec. lounges (4.25)
- Restroom availability (4.19)
- Terminal Ambiance (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.
H /L: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=122 Passengers.

EWB TC Performance

- TC satisfaction remained stable overall and on nearly all terminal elements, although it declined significantly on satisfaction with shopping facilities (3.49) and security check wait time (3.65)—also the lowest scoring item. Check-in staff efficiency was the highest scoring item (4.06), while parking value for the money was the lowest scoring (2.84).



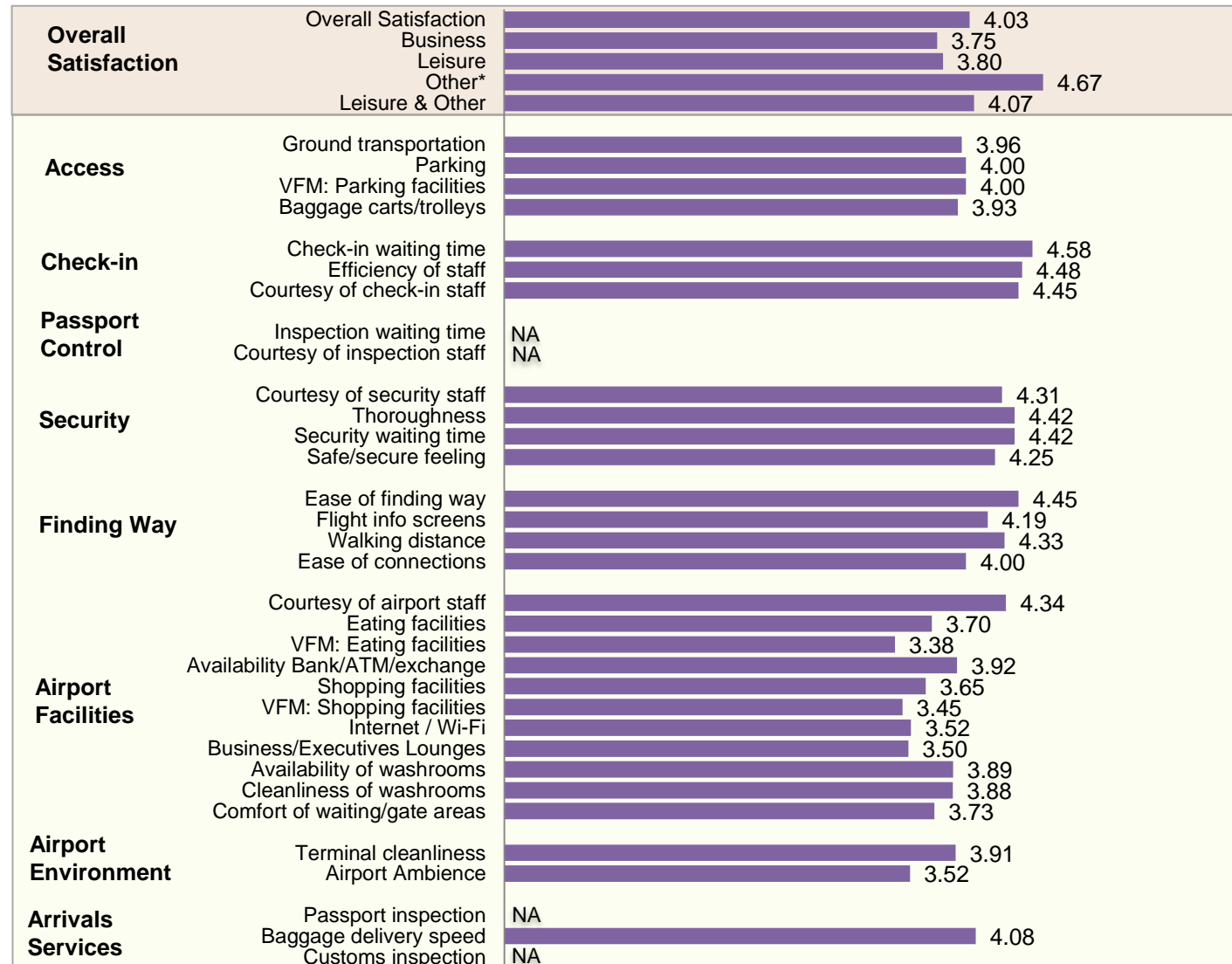
Business travelers rate TC higher than leisure travelers on parking facilities VFM (4.00)

International residents rate TC higher than domestic residents on parking facilities (5.00) and parking facilities VFM (5.00).

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=423 Passengers.

LGA TA Performance

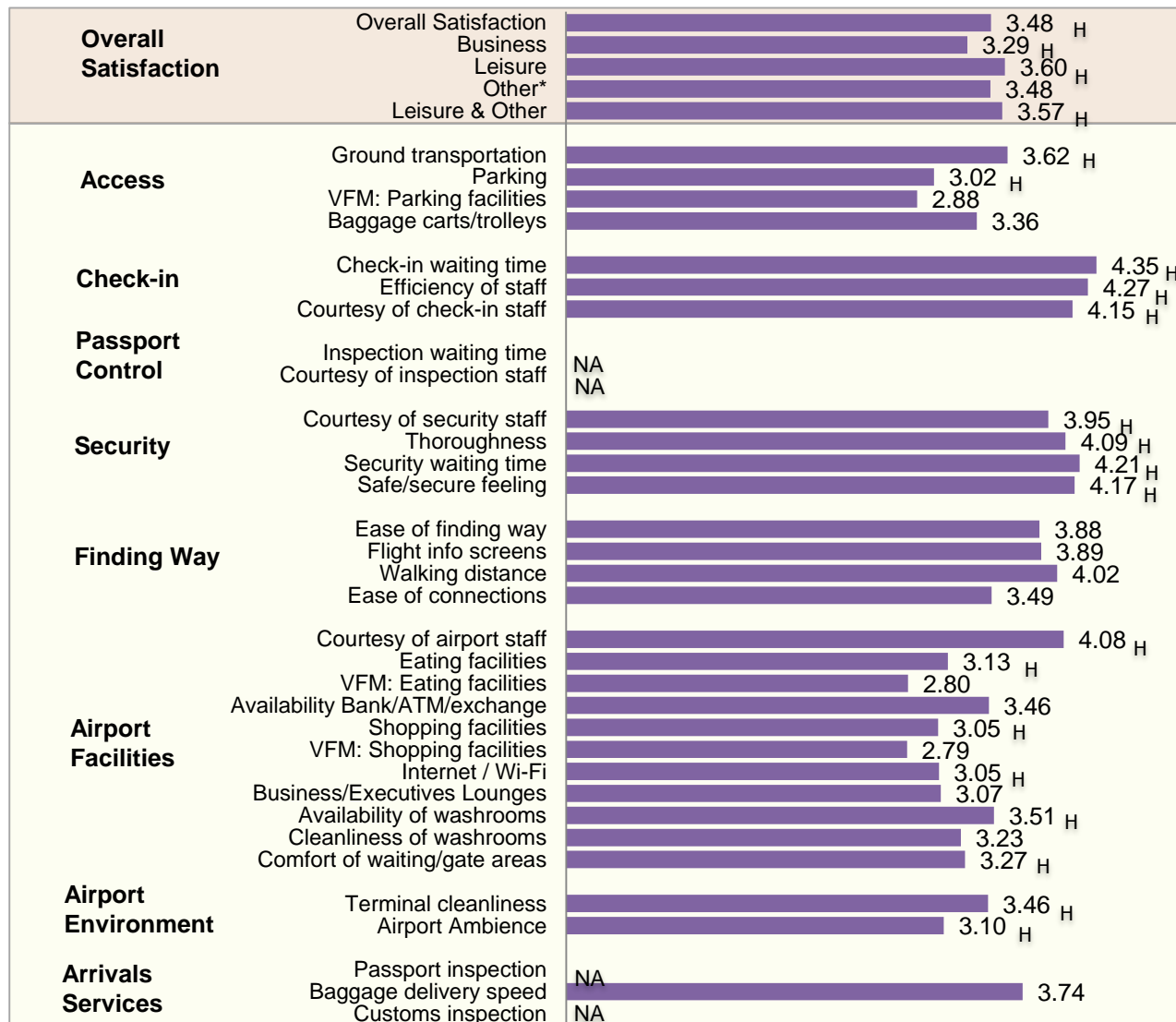
- LGA TA satisfaction remained stable with no significant changes. Check-in wait time satisfaction scored highest (4.58); eating facilities value for the money (VFM) scored lowest (3.38).



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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=34 Passengers

LGA TB Performance

- TB satisfaction improved significantly overall and on many major terminal elements, including: all check-in elements (highest scoring items), all security check elements, and nearly all facilities elements (eating facilities was the lowest scoring item), terminal cleanliness, ambiance and restroom availability. No terminal elements declined significantly in the 1st Qtr. 2018.



Compared to business travelers, leisure travelers rate TB higher on:

- Overall satisfaction (3.57)
- Parking facilities (3.28)
- Parking VFM (3.22)
- Baggage carts (3.49)
- Wayfinding (4.00)
- FIDS (3.99)
- Walking distance (4.14)
- Eating facilities (3.28)
- Restroom availability (3.63)
- Restroom cleanliness (3.36)
- Gate area comfort (3.44)
- Terminal cleanliness (3.28)
- Terminal ambiance (3.28)

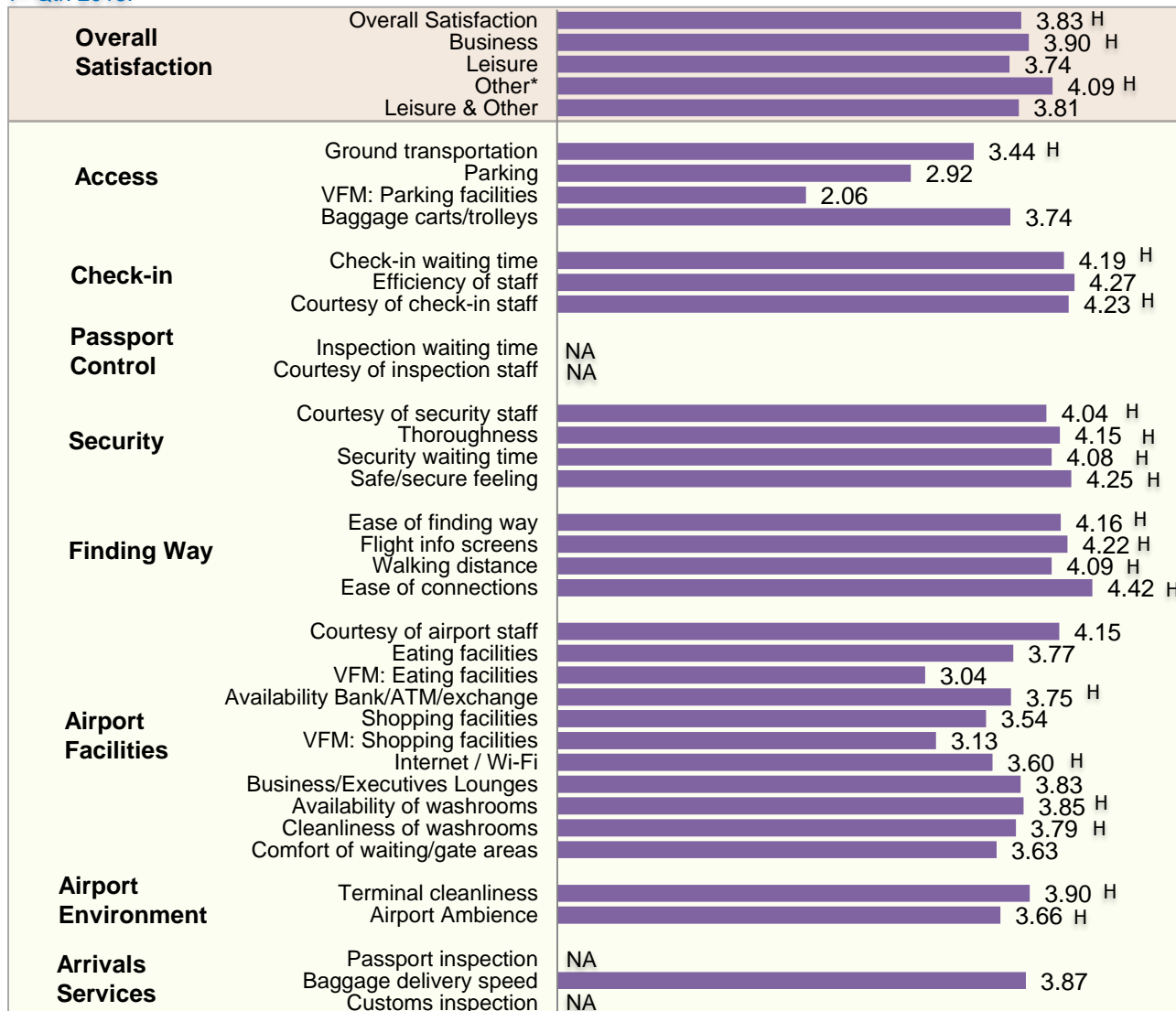
Compared to men, women rate TB higher on:

- Overall satisfaction (3.60)
- Check-in wait-time (4.49)
- Check-in staff efficiency (4.44)
- Check-in staff courtesy (4.35)
- Sec. Chk. thoroughness (4.19)
- Sec. Chk. wait-time (4.34)
- Wayfinding (3.99)
- Walking distance (4.12)
- Airport staff courtesy (4.22)
- Eating facilities (3.27)
- Eating facilities VFM (2.92)
- Arr. Baggage speed (3.95)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=371 Passengers.

LGA TC Performance

- TC satisfaction improved significantly overall and on many terminal elements, including check-in wait-time (4.19) and staff courtesy (4.23) – staff efficiency (4.27) was the highest scoring item, all security check elements, all wayfinding elements, some facilities elements (eating facilities was the lowest scoring item-3.04), terminal cleanliness (3.90) and ambiance (3.66) and restroom availability (3.85) and cleanliness (3.79). Parking facilities value for the money (2.06) was the lowest scoring item. No terminal elements declined significantly in 1st Qtr. 2018.



Compared to local O-D pax., connectors rate TC higher on:

- Overall satisfaction (3.75)
- Sec. Chk. thoroughness (4.50)
- Personal safety (4.61)
- Wayfinding (4.41)
- Internet/WiFi (4.09)
- Restroom availability (4.32)
- Restroom cleanliness (4.22)
- Gate area comfort (3.97)
- Terminal cleanliness (4.28)
- Terminal ambience (4.16)

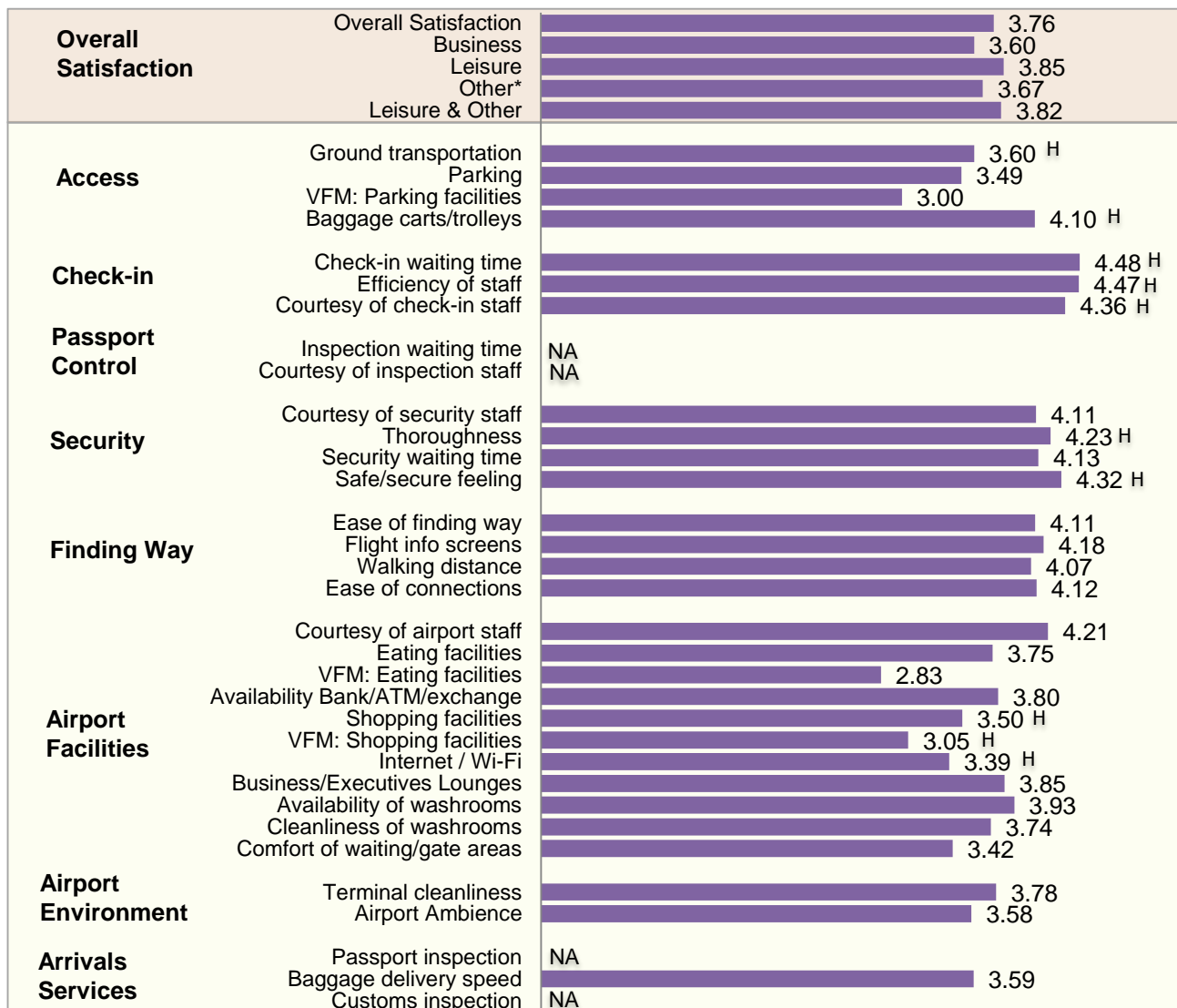
Business travelers rate TC higher than leisure travelers on:

- Personal safety (4.53)
- Internet/WiFi (3.97)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=206 Passengers.

LGA TD Performance

- TD satisfaction improved significantly on many terminal elements (but not overall), including all check-in elements (highest scoring items), thoroughness (4.23) and safe/secure feeling (4.32) at the security checkpoint, several facilities elements such as shopping (3.50) and its value for the money (3.05) and Internet/WiFi (3.39). Eating facilities value for the money (2.83) was the lowest scoring item. No terminal elements declined significantly in the 1st Qtr. 2018.



Compared to leisure travelers, business travelers rate TD higher on:

- Parking facilities (5.00)
- Parking VFM (5.00)
- Walking distance (4.31)

Lower on:

- Internet/WiFi (2.75)

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: Significantly Higher/Lower than 4th Qtr. 2017. Sample N=129 Passengers.

Thank You!



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