



J.D. POWER

2019 North America Airport Satisfaction Study

Wave 4 – Final Results

Michael Taylor, Practice Lead

September 25, 2019

Methodology

The 2019 J.D. Power North America Airport Satisfaction Study...

Quick Facts:

Online Survey

All respondents screened for:

- 18 years of age or older
- U.S. or Canadian resident
- At least one round-trip airline flight within North America originating or departing from a qualifying airport in the past 30 days

Three Segments Based on Annual Passenger Volume



Mega

33 MM+



Large

10 MM –
32.9 MM



Medium

4.5 MM –
9.9 MM



Fielded Continuously: October 2018-July 2019

Released Quarterly: December, March, June, October



Minimum 100 completes
for rank eligibility

*small sample ($30 < n < 99$)

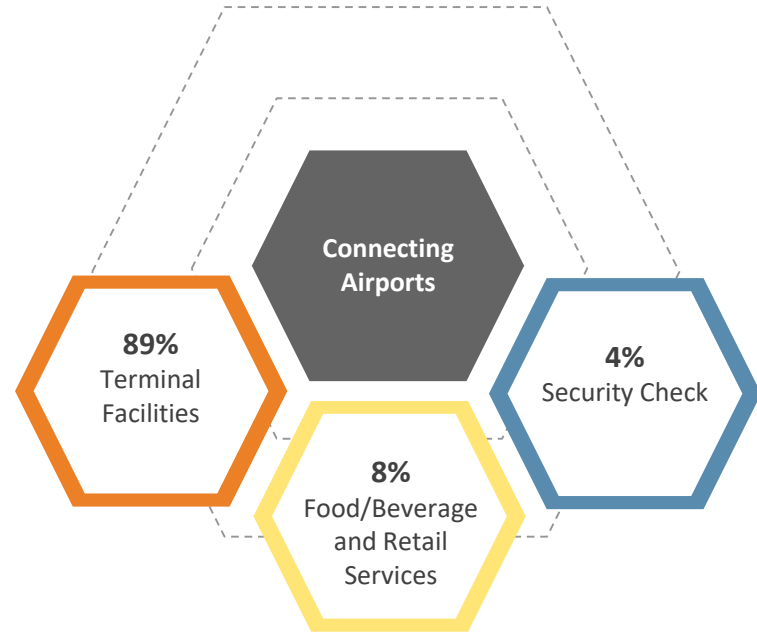
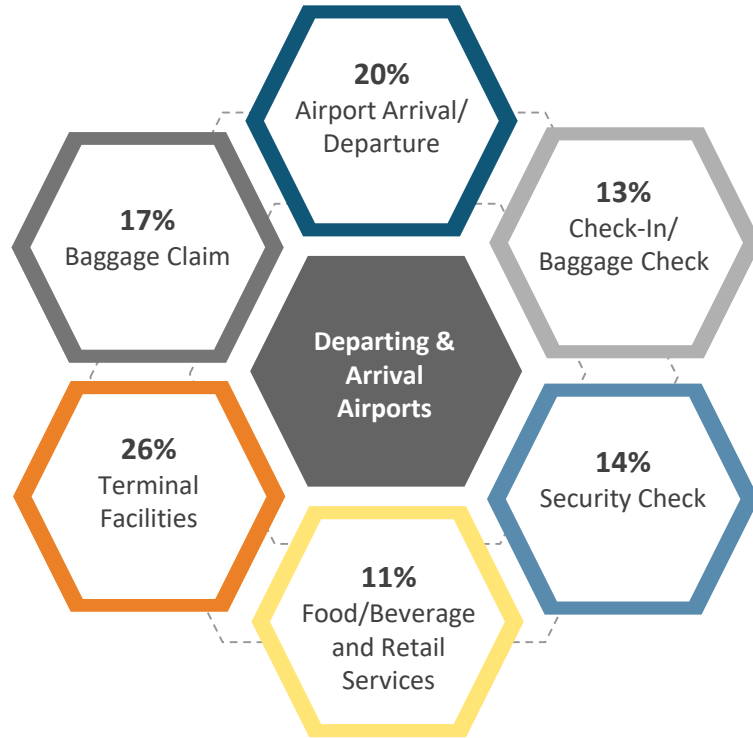
#insufficient sample ($n < 30$)



Survey Methodology - Factor Weights

The North America Airport Satisfaction Index model has been updated for 2019

Connecting airport data is only collected for Mega airports



Percentages may not equal 100% due to rounding.



J.D. POWER

Final Rankings 2019

Overall Satisfaction – Mega Airports

DTW ranks highest in overall satisfaction followed by MSP

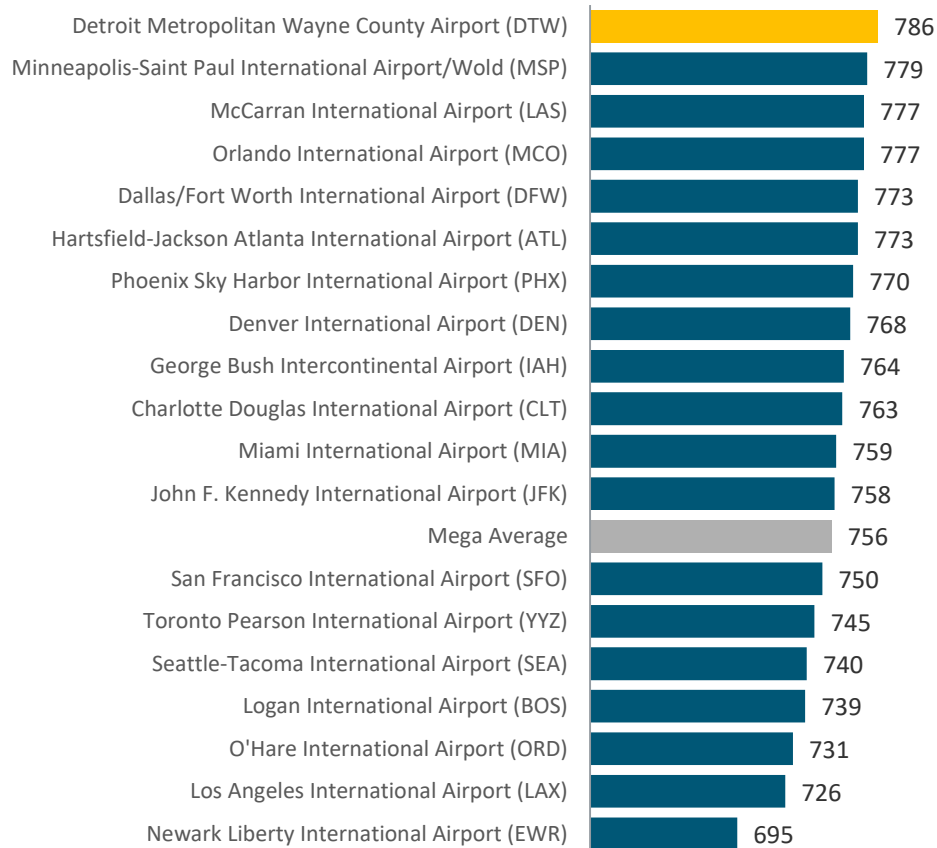
DTW performs highest in Security Check and Terminal Facilities

MCO performs highest in Airport Arrival/Departure

DFW performs highest in Check-In/Baggage Check and Food/Beverage & Retail Services

ATL performs highest in Baggage Claim

Overall Satisfaction Index – Mega Airports 2019



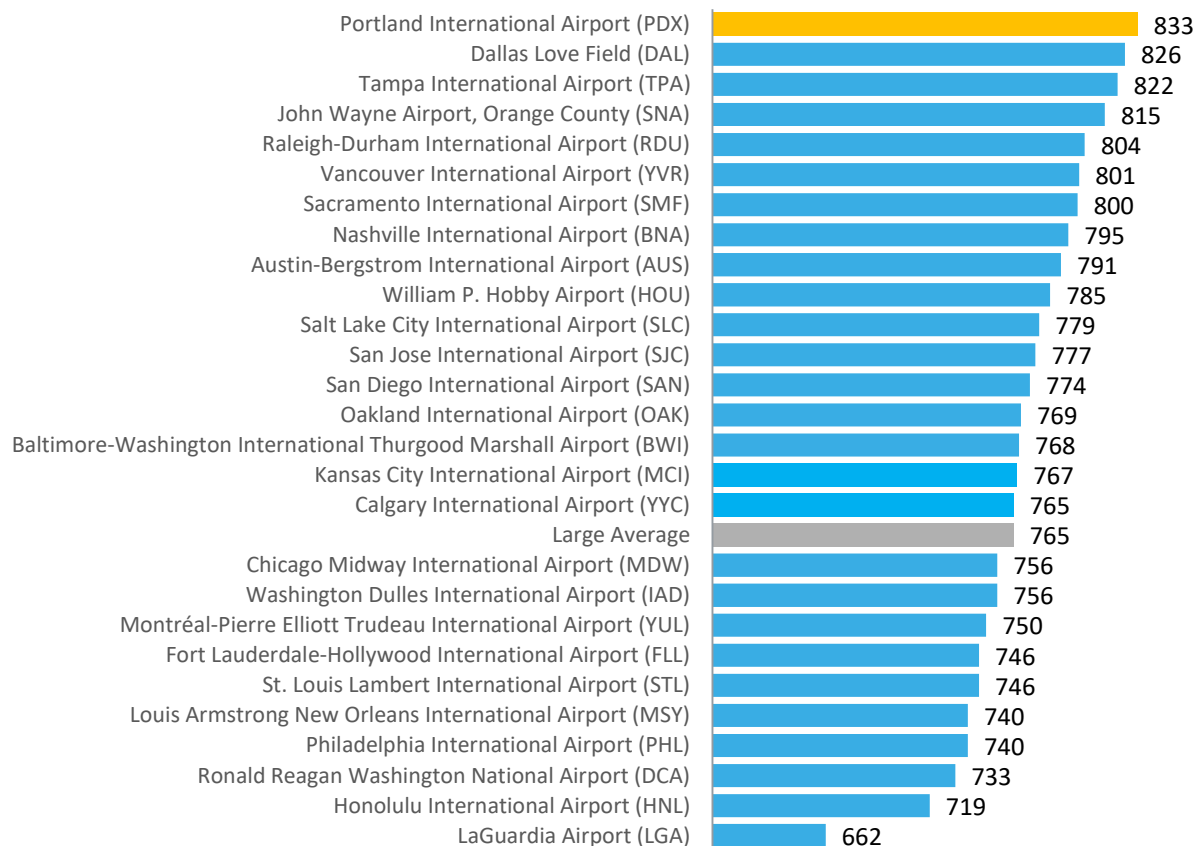
Overall Satisfaction – Large Airports

PDX performs highest in the overall satisfaction followed by DAL and TPA

PDX performs highest in Airport Arrival/Departure, Security Check, Terminal Facilities, Food/Beverage & Retail Services, and Baggage Claim

DAL performs highest in Check-In/Baggage Check

Overall Satisfaction Index – Large Airports 2019



Overall Satisfaction – Medium Airports

IND ranks highest in overall satisfaction followed by JAX and BUF

IND ranks highest in Terminal Facilities

RSW ranks highest in Airport Arrival/Departure

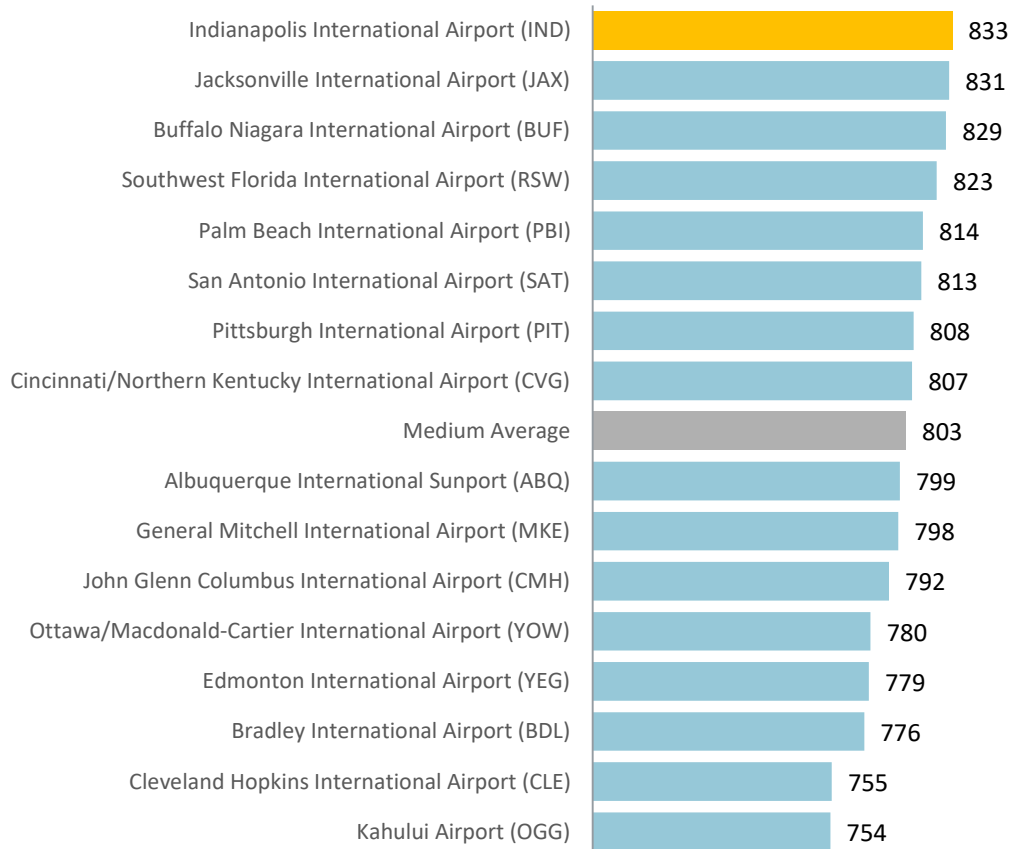
JAX ranks highest in Check-In/Baggage Check and Baggage Claim

BUF ranks highest in Security Check

PIT ranks highest in Food/Beverage & Retail Services

Note: Medium segment average includes ANC airport which was included in the study but not rank eligible due to small sample size (n<100).

Overall Satisfaction Index – Medium Airports 2019

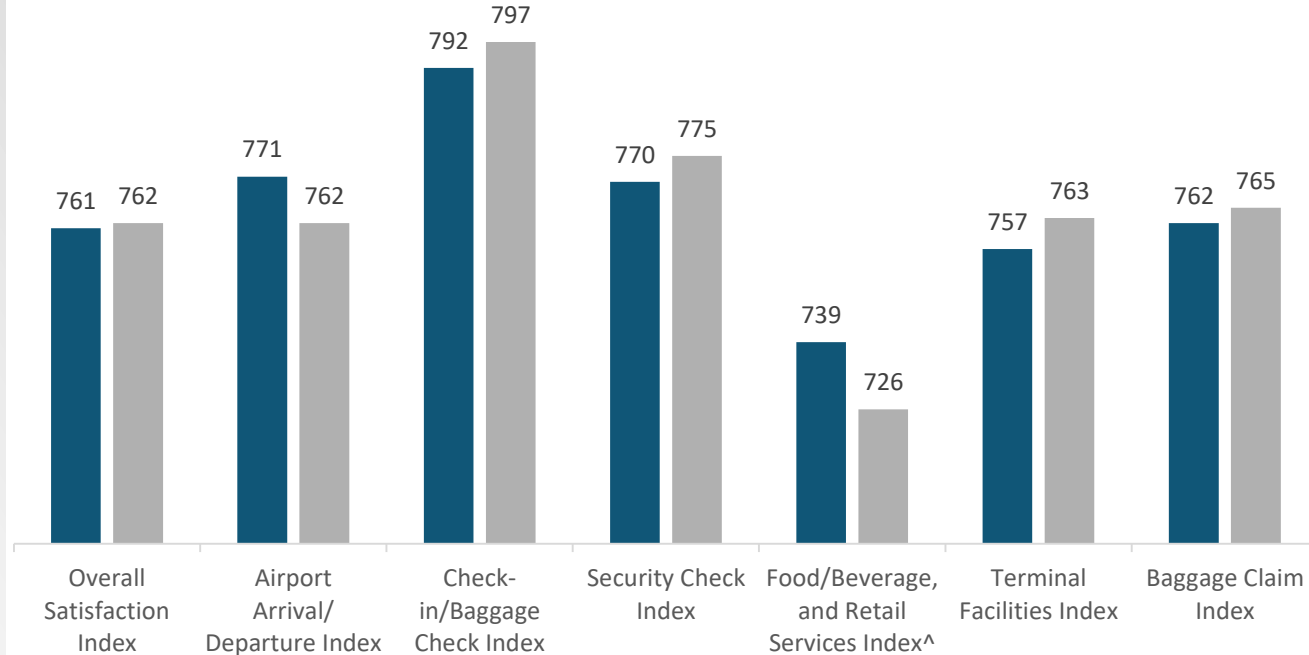


Segment Factor Performance

Accessibility challenges
(passenger volume and
construction) inhibit
Overall Satisfaction in the
industry

Segment Factor Performance

■ 2018 ■ 2019



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.

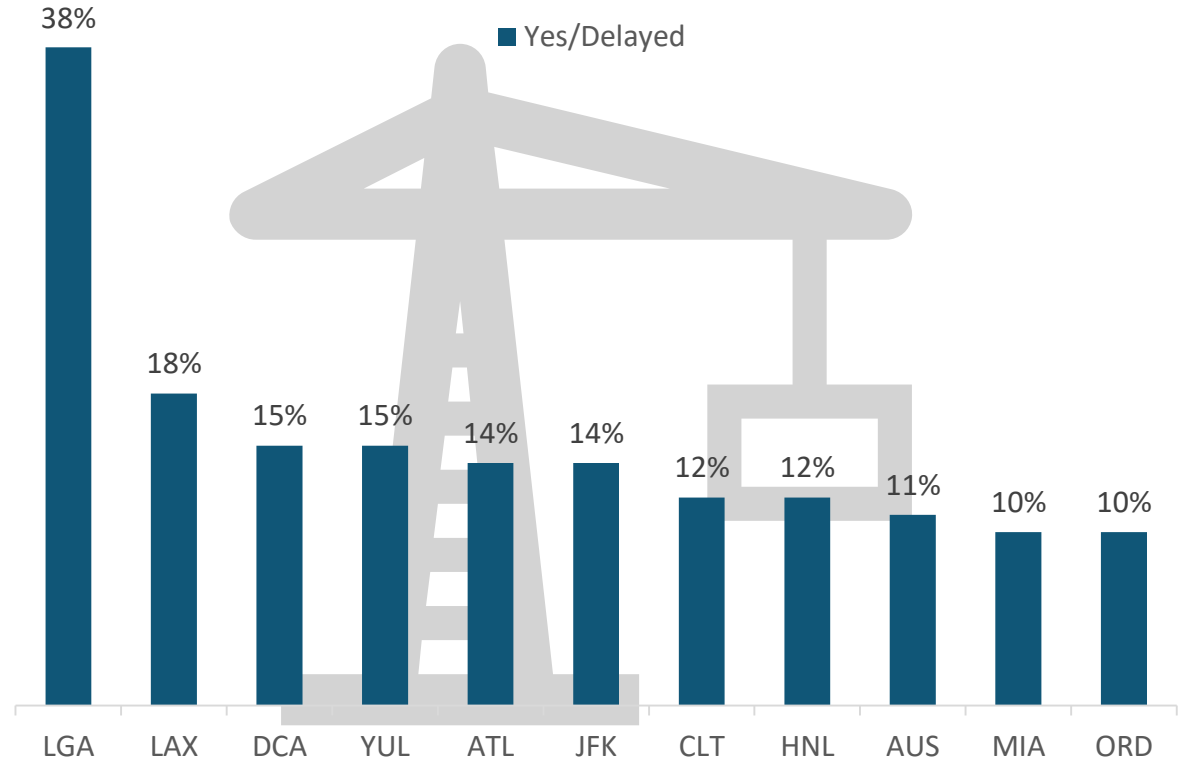


Selected Questions 2019

Did you notice construction at the airport?... “Yes, and it delayed my access into/away from the airport.”



Incidence of Construction Delays – Highest Incidence Airports

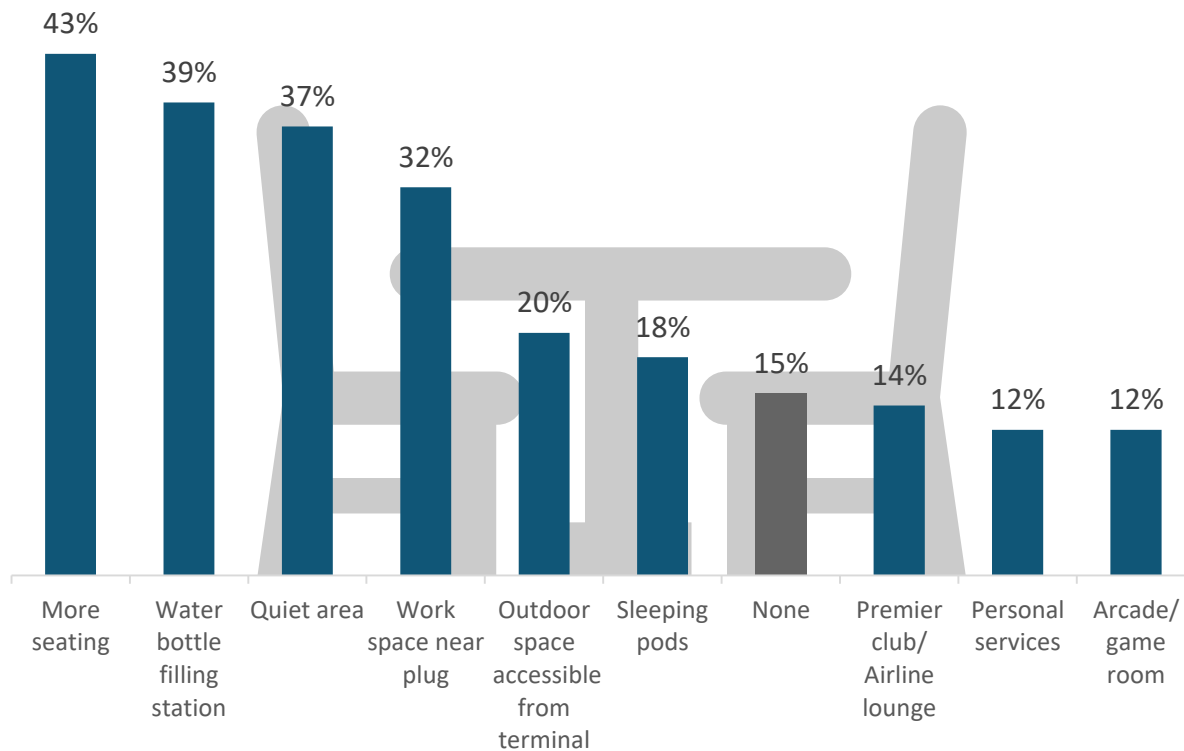


“What activities or services would you like to see offered at this airport?”



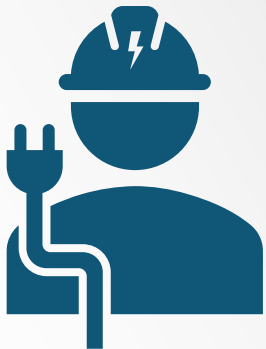
Wave 1-3 2019 only, not for release

Most Desired Activities/Services

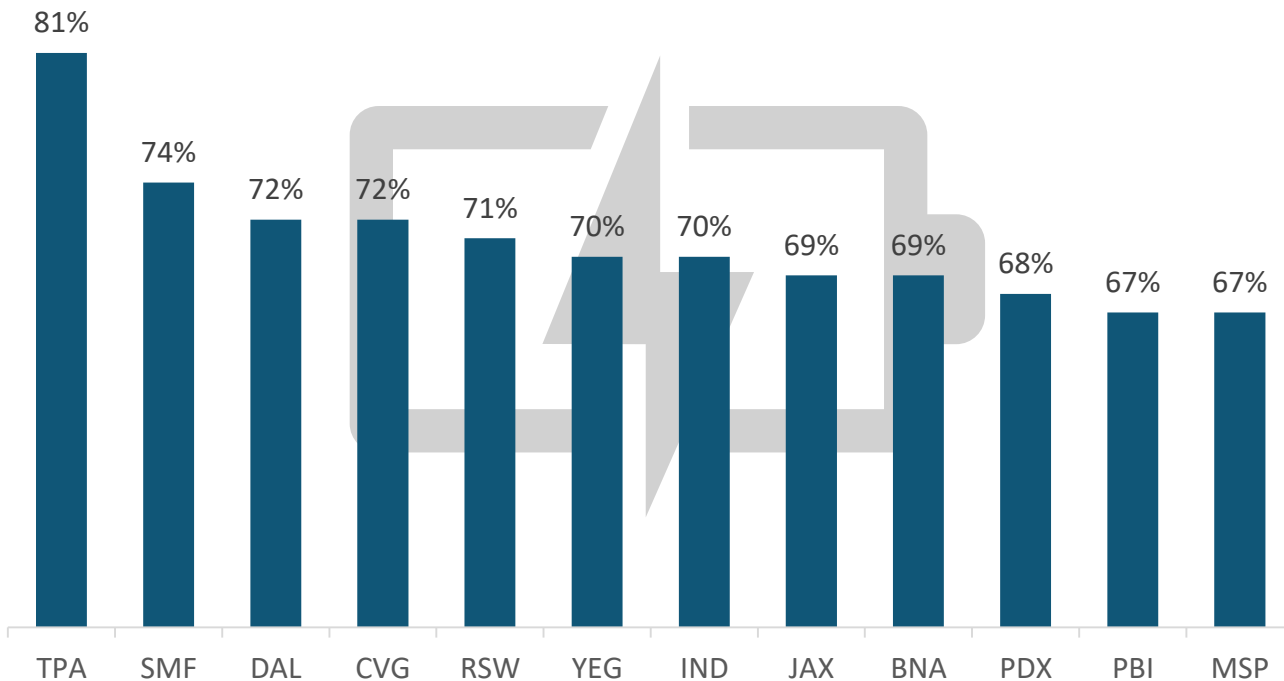


2019 Final

“Were there enough electrical outlets?”



Enough Electrical Outlets Provided – Top Airports



Wave 1-3 2019 only, not for release

Airport Emotions

New questions added to the 2019 study include sentiment and emotions evoked by the airport...

Questions include:

- I enjoy spending time in this airport
- This airport is more traveler-friendly than other airports
- The airport reflects a genuine sense of its city/location
- This airport helps alleviate the stress of travel

This Airport is More Traveler-Friendly than Other Airports is Most Closely Correlated with Overall Airport Satisfaction

$R^2 = 0.7662$



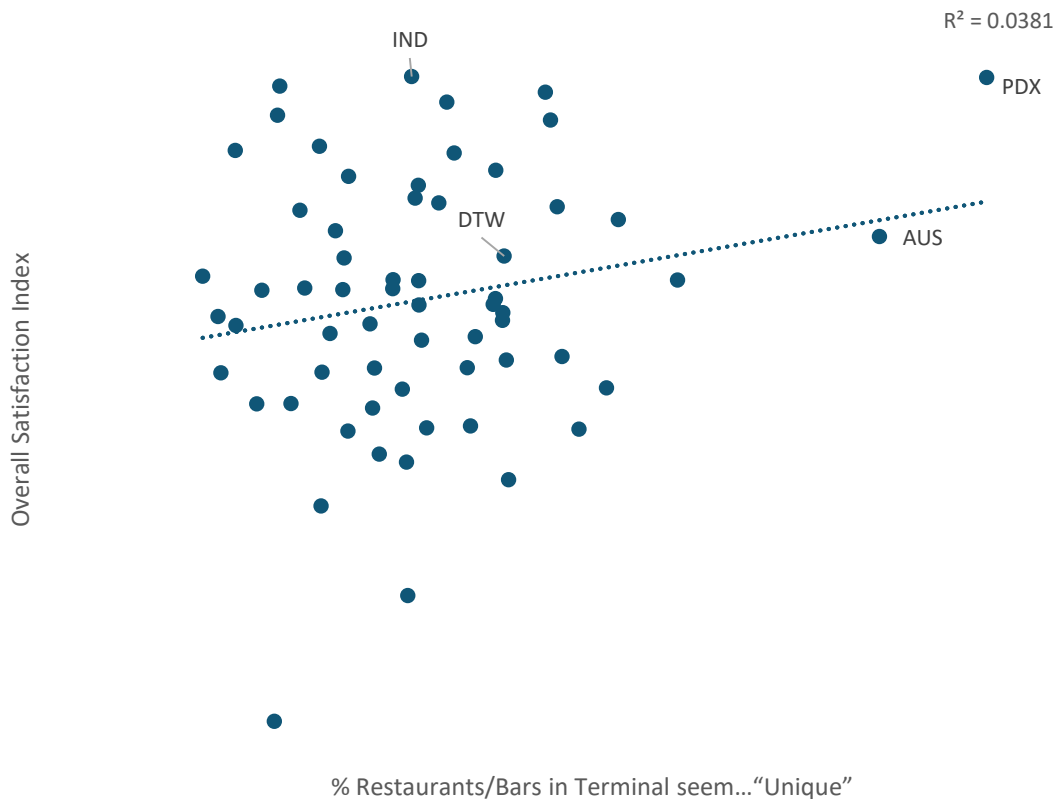
Airport Emotions

New questions added to the 2019 study include atmosphere of restaurants/bars throughout the terminal

Restaurants/Bars throughout the terminal seem---

- Crowded
- Inviting
- Comfortable
- Noisy
- Unique
- Relaxing
- Diverse
- Don't know

"Unique" Restaurants/Bars and Overall Airport Satisfaction





BIG ANNOUNCEMENT!

2020 emPOWER Airport Summit



Event Location:

**Loews Royal Pacific
Resort Orlando**

Dates:

April 21-22, 2020

SAVE THESE DATES!





Agenda: TBD

Speakers: J. D. Power
Award winners
specializing in
Customer Experience,
Loyalty, Working with
Vendors and Third
Parties





Event Location:

**Loews Royal Pacific
Resort Orlando**

Dates:

April 21-22, 2020



For more information, please visit:

jdpower.com

J.D. Power does not guarantee the accuracy, adequacy, or completeness of any information contained in this publication and is not responsible for any errors or omissions or for the results obtained from use of such information. Advertising claims cannot be based on information published in this publication. Reproduction of any material contained in this publication, including photocopying in part or in whole, is prohibited without the express written permission of J.D. Power. Any material quoted from this publication must be attributed to J.D. Power.

© 2019 J.D. Power. All Rights Reserved.