



Airport Performance Report

Second Quarter 2019

Summary Results for Aviation Management

July 31, 2019

A Customer Experience Presentation

2019 ACI-ASQ Study Objectives

- ➔ Provide a Customer Satisfaction Evaluation of the airport environment and the services and amenities provided while customers are at the airport.
- ➔ Provide a trended Benchmark Comparison for PA Airports to gauge our performance relative to: 1) customer experience improvement initiatives; and 2) the airport industry and our Peer Airports.
- ➔ 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 provide guidance for marketing, planning, investment and customer experience improvement initiatives.

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.

Participating Airports Q2 2019

→ In Q2 2019, 349 airports have participated in the ACI ASQ Survey.

→ 167,687 passengers have completed the ASQ Survey, including 3,054 at JFK, 1,035 at EWR, and 989 at LGA.

	< 2 M	2 - 5 M	5 - 15 M	15 - 25 M	25 - 40 M	> 40 M	TOTAL
AFRICA	13	7	6	1			27
	BFN, BZV, DLA, EBB, ELS, GRJ, KIM, LFW, MBA, NSI, PLZ, PNR, UTN	ABJ, ABV, ACC, DSS, LOS, MRU, RAK	ADD, CMN, CPT, DUR, NBO, TUN	JNB			
ASIA PACIFIC	12	34	29	13	7	20	115
	BTJ, BWX, DJB, DTB, IXZ, NTL, PGK, PPT, RPR, TNJ, TRZ, TSV	AMQ, ATQ, BBI, BDO, CCJ, CEI, CJB, DRW, HBA, HDY, IDR, IXB, IXC, IXE, IXR, KOE, LGK, LOP, MDC, MLE, PAT, PDG, PKU, PLM, PNK, REP, SOC, SRG, SXR, TRV, UKB, VNS, VTZ, YIH	ADL, AMD, BPN, CGQ, CHC, CNS, CNX, COK, FOC, GAU, GOI, HET, HLP, INC, ITM, JAI, KHN, KNO, LKO, MFM, OOL, PER, PNH, PNQ, RGN, SJW, UPG, WLG, XNN	AKL, CCU, DPS, HAK, HKT, HRB, HYD, MAA, SHE, SUB, SYX, TSN, WUH	BLR, DMK, GMP, HGH, KIX, MEL, NKG	BKK, BOM, CAN, CGK, CKG, CTU, DEL, HKG, ICN, KMG, KUL, NRT, PEK, PVG, SHA, SIN, SYD, SZX, TPE, XIY	
EUROPE	22	19	38	13	11	9	112
	AES, BOO, DSA, EAS, GRX, INV, KRS, LCG, LEI, MLN, OVD, PDL, PNA, REU, RMU, SDR, SPC, VDE, VGO, VLL, XRY, ZAZ	ABZ, BMA, CHQ, FNC, GRO, LCY, MAH, PFO, SCQ, SKP, SOU, SVG, TBS, TLL, TOS, TRD, TRN, VNO, ZAG	ACE, ADB, AER, ALC, BGO, BHX, BIO, BLQ, BRS, BSL, BUD, CIA, EDI, FAO, FUE, GLA, GOT, IBZ, KEF, KRK, LCA, LIN, LPA, LYS, MLA, MRS, NAP, NCE, NCL, OPO, OTP, RIX, SVQ, SXF, TFN, TFS, TLS, VLC	AGP, ATH, DUS, ESB, GVA, HAM, HEL, LED, LTN, MXP, PRG, TXL, WAW	ARN, BRU, CPH, DME, DUB, LIS, ORY, OSL, PMI, VIE, ZRH	AMS, BCN, CDG, FCO, LGW, LHR, MAD, MUC, SVO	
LATIN AMERICA / CARIBBEAN	10	11	10	2	2		35
	BDA, BRC, CUR, EPA, GPS, KIN, LIR, POP, RTB, SAP	AUA, BGI, COR, FLN, GYE, MDZ, MVD, NAS, POS, PVR, SDQ	AEP, CNF, EZE, GDL, PTY, PUJ, SJD, SJO, TIJ, UIO	GIG, SCL	BOG, CUN		
MIDDLE EAST	1		4	3	1	1	10
	SLL		AMM, BAH, DMM, MED	AUH, MCT, TLV	RUH	DXB	
NORTH AMERICA	8	8	13	6	6	9	50
	AVL, LAN, YMM, YQB, YQM, YQR, YXE, YYT	ELP, GRR, PWM, YHZ, YLW, YTZ, YWG, YYJ	CLE, CMH, CVG, IND, JAX, MKE, ONT, PIT, SAT, SJC, STL, YEG, YOW	AUS, DAL, SAN, SLC, TPA, YUL	BWI, DTW, FLL, LGA, MSP, PHL	ATL, BOS, DFW, EWR, JFK, LAX, SEA, SFO, YYZ	
TOTAL	66	79	100	38	27	39	349

Customized Peer Airport Panels

- The following airports form the Port Authority's Peer Airport Panel. Airports are selected primarily based on passenger traffic, passenger composition and airport location/infrastructure.

JFK PEER AIRPORTS

IATA

CODE AIRPORT NAME

AMS AMSTERDAM AIRPORT SCHIPHOL

ICN INCHEON INT'L AIRPORT

LAX LOS ANGELES INT'L AIRPORT

LHR LONDON HEATHROW AIRPORT

PVG SHANGHAI PUDONG INT'L AIRPORT

SIN SINGAPORE CHANGI AIRPORT

EWR PEER AIRPORTS

IATA

CODE AIRPORT NAME

BOS LOGAN INT'L AIRPORT

MSP MINNEAPOLIS–SAINT PAUL INT'L AIRPORT

MUC MUNICH AIRPORT

SEA SEATTLE–TACOMA INT'L AIRPORT

YYZ TORONTO PEARSON INT'L AIRPORT

LGA PEER AIRPORTS

IATA

CODE AIRPORT NAME

BOS LOGAN INT'L AIRPORT

BWI BALTIMORE–WASHINGTON INT'L AIRPORT

FLL FORT LAUDERDALE–HOLLYWOOD INT'L AIRPORT

MSP MINNEAPOLIS–SAINT PAUL INT'L AIRPORT

PHL PHILADELPHIA INT'L AIRPORT

“Who the Customer Is”

Q2 2019 Profile Comparison: PA Airport to Peer Airport Panel

	JFK Panel^		EWR Panel^		LGA Panel^	
Business	14%	23%	27%	30%	32%	29%
International	56%	68%	34%	28%	7%	14%
Connecting	27%	25%	22%	27%	11%	28%
Local O-D Pax. Dwell Time (mins.)	104.7	103.8	104.5	102.2	90.8	99.7
Women	57%	55%	54%	54%	58%	60%
Average Age	44	40	45	46	45	47
First/Business Class	11%	8%	13%	13%	15%	13%
Economy/Tourist Class	89%	92%	87%	87%	85%	87%
Check-in at Kiosk	24%	33%	35%	33%	27%	36%
Check-in Internet/Phone	34%	32%	40%	45%	48%	45%
Check-in at Main Desk	36%	32%	22%	23%	20%	20%
Check-in Curbside	2%	2%	2%	2%	2%	2%
Bag Drop Only	16%	21%	15%	19%	14%	21%
Avg. # of Round Trips (P12 Mos.)	4.6	5.5	5.8	5.5	7.4	5.5
<u>Top Modes of Access: *</u>						
Personal Car	32%	27%	35%	35%	27%	41%
Rental Car	3%	6%	9%	7%	3%	10%
Taxi/Limo	31%	20%	24%	14%	45%	15%
Rail/Subway	15%	16%	7%	13%	1%	3%
Bus/Shuttle	8%	20%	11%	16%	12%	15%
Other (Uber/Lyft, etc.)	11%	10%	14%	15%	11%	16%

* Among O-D Passengers; Statistically higher. ^ Excludes PA Airport

- The demographic and airport passenger usage profiles of JFK, EWR and LGA in Q1 exhibit some significant differences versus their respective peer airport panels.
- JFK and EWR have a smaller segment of business travelers than their respective peer airports (LGA has more), while JFK and LGA have less international travelers. EWR and LGA have a smaller share of connecting traffic. LGA passengers spend less time, on average, on-airport than its peer airport passengers. JFK passengers are older, while LGA passengers are younger. JFK and LGA passengers are more apt to buy upper class air tickets.
- Check-in via Internet/phone is more popular at EWR peer airports, while self-serve kiosk use is lower at JFK and LGA than their respective peer airports. Main counter check-in is higher at JFK, while bag drop is less pronounced at JFK, EWR and LGA.
- Compared to its respective peer airports, JFK airport access leads on personal/co. cars and taxi/limo usage, but trails on rental cars and bus/shuttle access modes. EWR leads on taxi/limo usage, but trails on bus/shuttle and rail/subway usage. LGA trails on nearly all access modes except taxi/limo (where it leads) and bus/shuttle (on a par with its peer airports).

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	<p>Notes:</p> <p>⁽¹⁾ Q7 "Overall Satisfaction" is filtered by Q4 "Main Reason for this air trip".</p> <p>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.</p>	
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.



Airport-level Satisfaction Performance



JFK Satisfaction Performance

JFK Airport Performance

		JFK	JFK Q2-Q1		JFK Q2	
		Q2 2019	2019		2019-18	
			Difference		Difference	
			(-) (+)		(-) (+)	
Overall Satisfaction	Overall Satisfaction	3.89	L -0.08		0.11	H
	Business	3.75	L -0.17		0.04	
	Leisure	3.90	L -0.06		0.14	H
	Other*	3.98	L -0.06		0.05	
	Leisure & Other	3.92	L -0.06		0.12	H
Access	Ground transportation	3.77	L -0.10		0.06	
	Parking	3.71	-0.09		0.05	
	VFM: Parking facilities	3.19	-0.16		0.26	
	Baggage carts/trolleys	3.75		0.04	0.14	
Check-in	Check-in waiting time	3.91	L -0.15		0.06	
	Efficiency of staff	4.04	L -0.12		-0.04	
	Courtesy of check-in staff	4.01	L -0.13		-0.03	
Security ID Check	Inspection waiting time	3.82	L -0.18		-0.05	
	Courtesy of inspection staff	3.83	L -0.13		-0.02	
Security	Courtesy of security staff	3.72	L -0.13		-0.03	
	Thoroughness	3.91	L -0.11		-0.04	
	Security waiting time	3.64	L -0.18		-0.01	
	Safe/secure feeling	4.10	L -0.06		0.02	
Finding Way	Ease of finding way	4.11	L -0.06		0.06	
	Flight info screens	4.10	L -0.07		0.05	
	Walking distance	3.75	L -0.06		0.04	
	Ease of connections	3.80		0.02	0.15	
Airport Facilities	Courtesy of airport staff	4.02	-0.05		0.10	H
	Eating facilities	3.61	-0.05		0.13	H
	VFM: Eating facilities	2.96	-0.07		0.14	H
	Availability Bank/ATM/exchange	3.68	-0.08		0.10	
	Shopping facilities	3.68	L -0.08		0.11	H
	VFM: Shopping facilities	3.14	-0.01		0.18	H
	Internet / Wi-Fi	3.82	-0.04		0.59	H
	Business/Executives Lounges	3.71	-0.05		0.21	H
	Availability of washrooms	4.03	-0.05		0.08	H
	Cleanliness of washrooms	3.84	-0.03		0.11	H
Airport Environment	Comfort of waiting/gate areas	3.79	0.00		0.08	H
	Terminal cleanliness	4.03	-0.04		0.05	
Arrivals Services	Airport Ambience	3.82	-0.04		0.07	
	Passport inspection	3.81	L -0.12		-0.01	
	Baggage delivery speed	3.77	-0.02		0.08	
	Customs inspection	3.74	L -0.09		0.02	

- JFK passenger satisfaction improved significantly overall in Q2 2019 (3.89) vs. year-over-year (YOY, Q2 2018) and also among leisure travelers. It also increased significantly for nearly all airport facilities elements, except availability of ATMs/ CurrencyExchanges (3.68). All other airport elements remained steady.
- Concurrently, passenger satisfaction declined significantly overall (3.89) and among both business (3.75) and leisure (3.90) travelers vs. last quarter (Q1 2019). It also declined significantly for many airport elements, especially those related to check-in, the security check process and wayfinding, with the exception of connections which remained steady. Airport facilities elements generally remained steady, although shopping facilities (3.68) decreased significantly, as did satisfaction with the arrivals experience at passport control (3.81) and customs inspection (3.74).
- The highest scoring airport element in Q2 2019 is ease of finding way (4.11); the lowest was eating facilities VFM (2.96).

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: Q2 2019 (N=3,054) significantly Higher/Lower than Q1 2019 or Q2 2018.

JFK Airport Performance vs. Peer Panel

					Peer Panel	JFK Rank~	AMS	LAX	LHR	ICN	PVG	SIN					
Overall Satisfaction	Overall Satisfaction	<div></div>	3.89	H2/L1	4.24	L	6	3.98	L	3.85	H	4.18	L	5.00	L	5.00	L
	Business	<div></div>	3.75	L1	4.10	L	6	3.96	L	3.70	L	4.08	L	5.00	L	4.99	L
	Leisure	<div></div>	3.90	H2/L1	4.24	L	6	4.00	L	3.88	L	4.21	L	5.00	L	5.00	L
	Other*	<div></div>	3.98		4.42	L	5	3.94	L	3.89	L	4.21	L	5.00	L	5.00	L
	Leisure & Other	<div></div>	3.92	H2/L1	4.28	L	6	3.99	L	3.88	L	4.21	L	5.00	L	5.00	L
Access	Ground transportation	<div></div>	3.77	L1	4.18	L	6	4.18	L	3.63	H	4.09	L	4.92	L	4.85	L
	Parking	<div></div>	3.71		4.01	L	5	3.44	L	3.34	H	3.95	L	4.96	L	4.76	L
	VFM: Parking facilities	<div></div>	3.19		3.49	L	4	2.46	H	2.88	H	3.03	L	4.84	L	4.70	L
	Baggage carts/trolleys	<div></div>	3.75		4.29	L	6	4.02	L	3.67	L	4.06	L	4.92	L	4.87	L
Check-in	Check-in waiting time	<div></div>	3.91	L1	4.31	L	7	3.95	L	4.06	L	4.22	L	4.94	L	4.80	L
	Efficiency of staff	<div></div>	4.04	L1	4.41	L	6	4.03	L	4.20	L	4.34	L	4.96	L	4.84	L
	Courtesy of check-in staff	<div></div>	4.01	L1	4.43	L	7	4.13	L	4.22	L	4.36	L	4.94	L	4.84	L
Security ID Check	Inspection waiting time	<div></div>	3.82	L1	4.36	L	7	4.03	L	4.06	L	4.29	L	4.95	L	4.84	L
	Courtesy of inspection staff	<div></div>	3.83	L1	4.37	L	7	4.16	L	4.08	L	4.30	L	4.93	L	4.82	L
Security	Courtesy of security staff	<div></div>	3.72	L1	4.27	L	7	4.09	L	3.99	L	4.14	L	4.89	L	4.82	L
	Thoroughness	<div></div>	3.91	L1	4.36	L	7	4.16	L	4.13	L	4.25	L	4.95	L	4.84	L
	Security waiting time	<div></div>	3.64	L1	4.22	L	7	4.04	L	3.96	L	4.04	L	4.95	L	4.80	L
	Safe/secure feeling	<div></div>	4.10	L1	4.41	L	7	4.22	L	4.20	L	4.32	L	4.96	L	4.83	L
Finding Way	Ease of finding way	<div></div>	4.11	L1	4.28	L	5	4.01	L	3.98	H	4.22	L	4.92	L	4.84	L
	Flight info screens	<div></div>	4.10	L1	4.35	L	5	4.01	L	4.07	L	4.31	L	4.96	L	4.85	L
	Walking distance	<div></div>	3.75	L1	4.07	L	6	3.26	L	3.91	L	3.88	L	4.86	L	4.75	L
	Ease of connections	<div></div>	3.80		3.95	L	6	3.90	L	3.51	H	3.89	L	4.90	L	4.69	L
Airport Facilities	Courtesy of airport staff	<div></div>	4.02	H2	4.40	L	7	4.11	L	4.15	L	4.32	L	4.96	L	4.85	L
	Eating facilities	<div></div>	3.61	H2	4.07	L	7	3.69	L	3.67	L	3.95	L	4.86	L	4.80	L
	VFM: Eating facilities	<div></div>	2.96	H2	3.60	L	6	2.88	L	2.98	L	3.43	L	4.79	L	4.71	L
	Availability Bank/ATM/exchange	<div></div>	3.68		4.27	L	6	3.68	L	3.73	L	3.96	L	4.91	L	4.90	L
	Shopping facilities	<div></div>	3.68	H2/L1	4.17	L	6	3.85	L	3.68	L	4.03	L	4.92	L	4.87	L
	VFM: Shopping facilities	<div></div>	3.14	H2	3.74	L	5	3.10	L	3.06	L	3.39	L	4.88	L	4.85	L
	Internet / Wi-Fi	<div></div>	3.82	H2	4.16	L	6	3.83	L	3.72	H	4.04	L	4.97	L	4.86	L
	Business/Executives Lounges	<div></div>	3.71	H2	4.36	L	6	3.76	L	3.59	L	4.06	L	4.96	L	4.92	L
	Availability of washrooms	<div></div>	4.03	H2	4.29	L	5	3.93	H	4.01	L	4.19	L	4.98	L	4.91	L
Airport Environment	Cleanliness of washrooms	<div></div>	3.84	H2	4.22	L	6	3.74	L	3.88	L	4.13	L	4.97	L	4.87	L
	Comfort of waiting/gate areas	<div></div>	3.79	H2	3.98	L	5	3.47	H	3.59	H	3.82	L	4.98	L	4.89	L
	Terminal cleanliness	<div></div>	4.03		4.29	L	5	3.95	H	3.92	H	4.27	L	4.99	L	4.95	L
	Airport Ambience	<div></div>	3.82		4.12	L	5	3.79	L	3.71	H	4.03	L	4.98	L	4.96	L
Arrivals Services	Passport inspection	<div></div>	3.81	L1	4.25	L	7	3.99	L	3.97	L	4.09	L	4.94	L	4.95	L
	Baggage delivery speed	<div></div>	3.77		4.07	L	5	3.57	H	3.70	L	3.86	L	4.80	L	4.90	L
	Customs inspection	<div></div>	3.74	L1	4.20	L	7	3.90	L	3.77	L	4.05	L	4.95	L	4.90	L

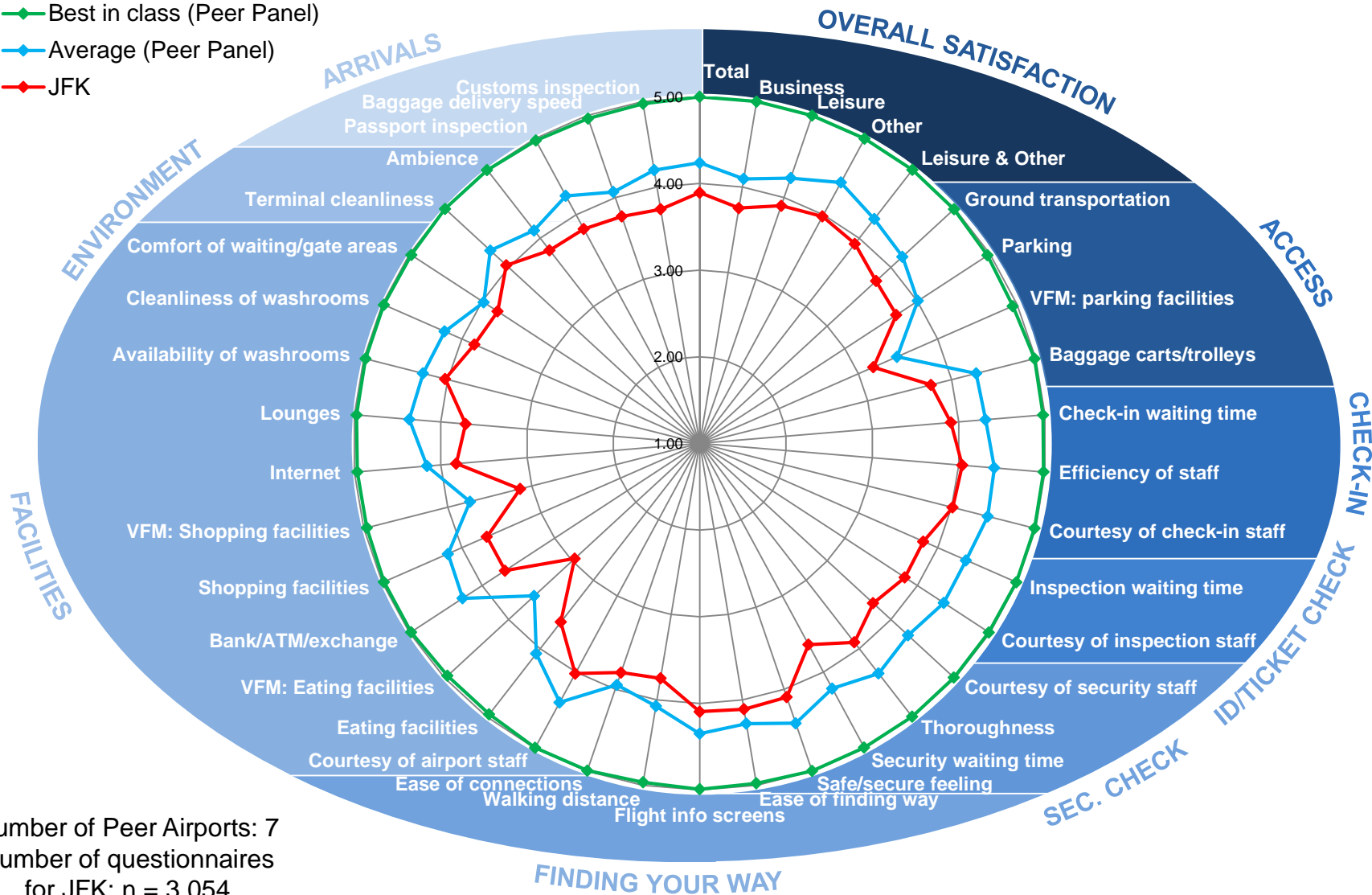
- Despite improvement overall and some airport elements year-over-year -- YOY (Q2 2018) in passenger satisfaction, JFK still significantly under-performs the peer airports panel overall and on all airport elements, with most items ranked toward the bottom, except on parking facilities value for the money, VFM (3.19; ranked 4), where JFK leads LAX (2.88) and AMS (2.46) and JFK parking facilities themselves (3.71) outperform LAX (3.34) and is comparable to AMS (3.44).
- JFK also outperforms LAX and/or AMS on several other airport elements (although it did so on more elements last quarter -- Q1 2019), such as: overall satisfaction (3.85-LAX), wayfinding (3.98-LAX; 4.01-AMS), walking distance (3.26-AMS), ease of connections (3.51-LAX), Internet/Wi-Fi access (3.72-LAX), restroom availability (3.93-AMS), comfort at the gate (3.59-LAX; 3.47-AMS), terminal cleanliness (3.92-LAX; 3.95-AMS), airport ambience (3.71-LAX) and arrivals bag speed (3.57-AMS).
- JFK performs on a par with AMS and/or LAX on most airport facility elements, except airport staff courtesy (4.15-LAX leads), shopping facilities (3.85-AMS leads). JFK is on a par with AMS on all three check-in elements, FIDS (4.01), connections (3.90) and airport ambience (3.79). JFK is on a par with LAX on baggage carts (3.67) FIDS (4.07), arrivals bag speed (3.70) and customs inspection (3.77).
- JFK is also on a par with LHR on parking facilities VFM (3.03), connections (3.89) and comfort at the gate (3.82).
- Compared to ICN/PVG/SIN, JFK trails significantly overall and on all airport elements.

Mean Scores based on rating scale: 1-Poor, 2-Fair, 3-Good, 4- Very Good, 5- Excellent. JFK N=3,054.

H1/2; L1/2: Significantly Higher/Lower than Q1 2019/Q2 2018; JFK Q2 2019 H/L: Significantly Higher/Lower than Peer Panel/Airport; ~ Rank against Peer Panel of 6 airports.

JFK Performance vs. Peer Panel

- Best in class (Peer Panel)
- Average (Peer Panel)
- JFK

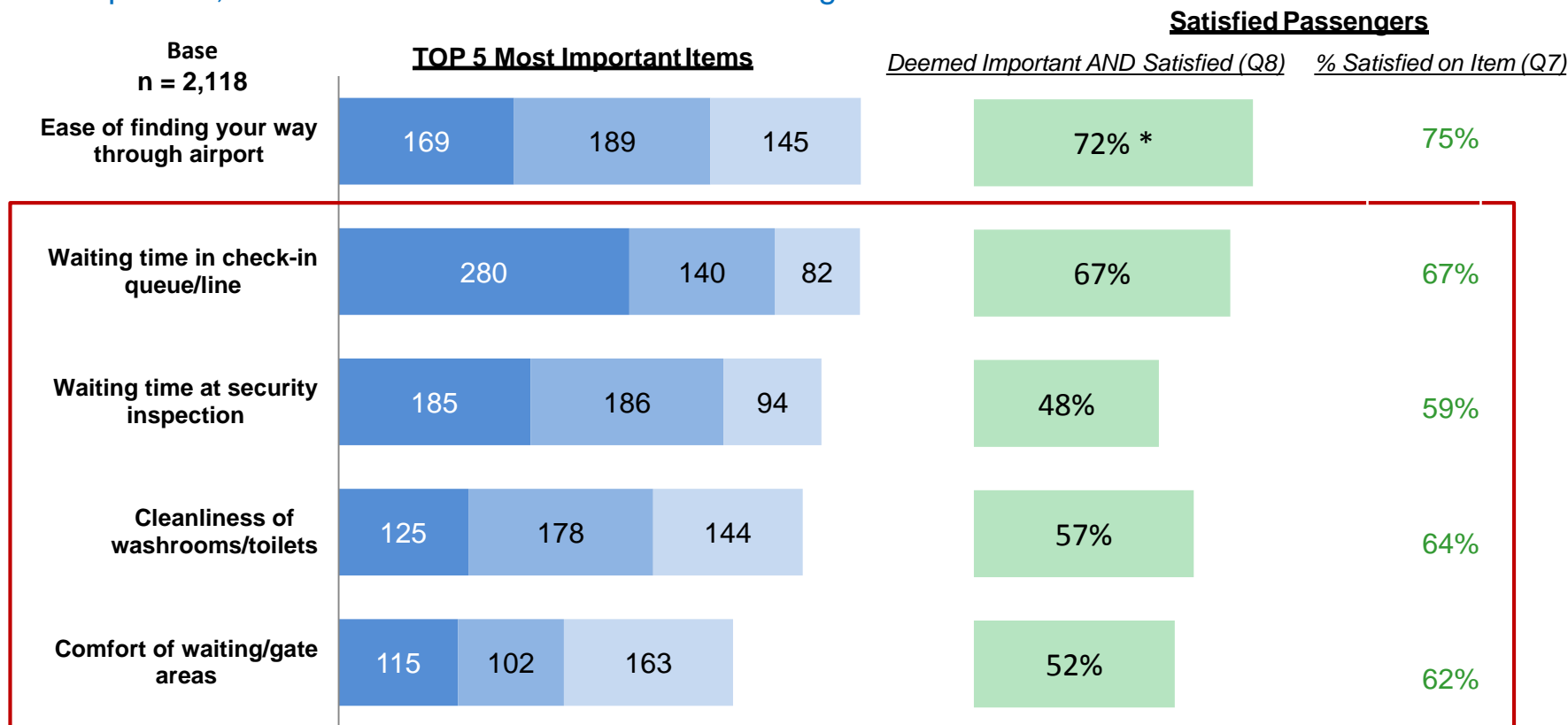


Number of Peer Airports: 7
Number of questionnaires
for JFK: n = 3,054

JFK– Airport Performance

Top 5 Most Important Items – Satisfied Passengers

- Four of the top five airport importance elements indicate a weakness for JFK (under 70% satisfaction for those who deem the item important): wait-time at the check-in queue, wait-time at the security inspection, restroom cleanliness and comfort at the gate area.



Notes: ■ 1st most important ■ 2nd most important ■ 3rd most important

Top 5: from Q8: "Which of the items listed in Question 7 are the 1st / 2nd / 3rd most important to you at this airport?"

The figures represent the number of respondents who mention the item.

Satisfied Passengers are among the respondents who mention the item as important at Q8.

Satisfied Passengers among the respondents to Q7 items "Based on your experience today, please rate this airport on each service item".

Base is Respondents providing a valid response

* Scores 4 + 5
(Excellent+
Very Good)



EWR Satisfaction Performance

EWR Airport Performance

		EWR Q2 2019		EWR Q2-Q1 2019 Difference (-) (+)		EWR Q2 2019-18 Difference (-) (+)	
		Q2 2019					
Overall Satisfaction	Overall Satisfaction	3.80		L -0.09		0.17	H
	Business	3.66		-0.10		0.23	H
	Leisure	3.88		-0.07		0.14	H
	Other*	3.75		-0.17		0.18	
	Leisure & Other	3.86		-0.09		0.15	H
Access	Ground transportation	3.86		-0.11		0.13	
	Parking	3.46		-0.14		0.01	
	VFM: Parking facilities	2.95			0.05	0.01	
	Baggage carts/trolleys	3.69		-0.09		0.33	H
Check-in	Check-in waiting time	4.04		L -0.10		0.09	
	Efficiency of staff	4.13		-0.09		0.06	
	Courtesy of check-in staff	4.10		-0.10		0.16	H
Security ID Check	Inspection waiting time	4.03		-0.07		0.18	H
	Courtesy of inspection staff	4.05		-0.08		0.20	H
Security	Courtesy of security staff	3.92		L -0.11		0.20	H
	Thoroughness	4.05		-0.06		0.17	H
	Security waiting time	3.83		-0.10		0.27	H
	Safe/secure feeling	4.11		L -0.10		0.13	H
Finding Way	Ease of finding way	4.03		L -0.13		0.04	
	Flight info screens	4.05		L -0.11			
	Walking distance	3.86		-0.06		0.10	
	Ease of connections	3.68		-0.18		0.10	
Airport Facilities	Courtesy of airport staff	4.05		L -0.12		0.11	H
	Eating facilities	3.65		-0.04		0.16	H
	VFM: Eating facilities	2.98			0.04	0.12	
	Availability Bank/ATM/exchange	3.60		-0.01		0.02	
	Shopping facilities	3.48		-0.07		0.06	
	VFM: Shopping facilities	3.05			0.05	0.13	
	Internet / Wi-Fi	3.75		-0.10		0.47	H
	Business/Executives Lounges	3.59		-0.01		0.33	H
	Availability of washrooms	3.89		-0.02		0.23	H
	Cleanliness of washrooms	3.71		-0.02		0.33	H
	Comfort of waiting/gate areas	3.68		-0.08		0.15	H
Airport Environment	Terminal cleanliness	3.94		L -0.09		0.17	H
	Airport Ambience	3.67		-0.07		0.13	H
Arrivals Services	Passport inspection	3.94		-0.03		0.18	H
	Baggage delivery speed	3.81			0.06	0.28	H
	Customs inspection	3.86			0.01	0.22	H

→ EWR passenger satisfaction increased significantly overall (3.80) versus YOY (Q2 2018) and for both leisure (3.88) and business (3.66) travelers. Many airport elements improved significantly YOY: baggage carts (3.69), check-in staff courtesy (4.10), all security check elements, airport staff courtesy (4.05), eating facilities (3.65), Internet/Wi-Fi access (3.75), business lounges (3.59), restroom cleanliness (3.71) and availability (3.89), terminal cleanliness (3.94), airport ambience (3.67), comfort at the gate (3.68), arrivals passport control (3.94), customs inspection (3.86) and bag speed (3.81).

→ EWR passenger satisfaction since last quarter (Q1 2019) declined significantly overall (3.80) and on several elements: check-in wait time (4.04), TSA courtesy (3.92), safe/secure feeling (4.11), ease of finding way (4.03), FIDS (4.05), airport staff courtesy (4.05) and terminal cleanliness (3.94). All other airport and terminal elements remained steady.

→ The highest scoring element in Q2 2019 is check-in staff efficiency (4.13); the lowest scoring is parking facilities VFM (2.95).

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.

H/L: Q2 2019 (N=1,035) significantly Higher/Lower than Q1 2019 or Q2 2018.

EWR Airport Performance vs. Peer Panel

			Peer Panel	EWR Rank~	BOS	MSP	MUC	SEA	YYZ
Overall Satisfaction	Overall Satisfaction	3.80 L1/H2	4.10 L	6	4.10 L	4.32 L	4.00 L	3.97 L	4.49 L
	Business	3.66 H2	4.03 L	6	4.04 L	4.24 L	4.01 L	3.86 L	4.37 L
	Leisure	3.88 H2	4.12 L	6	4.13 L	4.33 L	3.96	4.02 L	4.50 L
	Other*	3.75	4.17 L	6	4.08 L	4.44 L	4.33 L	3.95	4.58 L
	Leisure & Other	3.86 H2	4.13 L	6	4.12 L	4.35 L	3.99 L	4.01 L	4.52 L
Access	Ground transportation	3.86	3.99 L	5	3.92	4.15 L	3.71 H	4.12 L	4.36 L
	Parking	3.46	3.63	5	3.46	3.79	3.68	3.51	4.06 L
	VFM: Parking facilities	2.95	2.88	4	2.68	3.09	2.33 H	2.96	3.58 L
	Baggage carts/trolleys	3.69 H2	3.91 L	6	3.87 L	3.86	3.71	3.82	4.44 L
Check-in	Check-in waiting time	4.04 L1	4.11	4	4.14 L	4.26 L	3.84 H	4.03	4.44 L
	Efficiency of staff	4.13	4.26 L	5	4.25 L	4.43 L	3.90 H	4.30 L	4.50 L
	Courtesy of check-in staff	4.10 H2	4.27 L	5	4.24 L	4.45 L	3.86 H	4.35 L	4.55 L
Security ID Check	Inspection waiting time	4.03 H2	4.05	4	4.19 L	4.39	4.00	3.88 H	4.25 L
	Courtesy of inspection staff	4.05 H2	4.17 L	5	4.18 L	4.28	3.96	4.21 L	4.36 L
Security	Courtesy of security staff	3.92 L1/H2	4.15 L	6	4.14 L	4.29 L	3.92	4.14 L	4.48 L
	Thoroughness	4.05 H2	4.23 L	5	4.23 L	4.30 L	4.01	4.21 L	4.55 L
	Security waiting time	3.83 H2	3.99 L	5	4.02 L	4.16 L	3.94 L	3.79	4.40 L
	Safe/secure feeling	4.11 L1/H2	4.29 L	6	4.24 L	4.40 L	4.13	4.28 L	4.60 L
Finding Way	Ease of finding way	4.03	4.15 L	5	4.24 L	4.29 L	3.90 H	4.11	4.37 L
	Flight info screens	4.05	4.19 L	5	4.24 L	4.38 L	3.85 H	4.18 L	4.50 L
	Walking distance	3.86	3.88	3	4.07 L	3.84	3.58 H	3.85	4.05 L
	Ease of connections	3.68	3.99 L	6	3.95 L	3.96 L	3.81	4.01 L	4.30 L
Airport Facilities	Courtesy of airport staff	4.05 L1/H2	4.26 L	5	4.23 L	4.35 L	4.00	4.29 L	4.56 L
	Eating facilities	3.65 H2	3.82 L	5	3.65	4.10 L	3.81 L	3.80 L	4.17 L
	VFM: Eating facilities	2.98	3.22 L	5	3.24 L	3.35 L	2.93	3.17 L	3.60 L
	Availability Bank/ATM/exchange	3.60	3.82 L	5	3.89 L	3.78	3.55	3.74	4.18 L
	Shopping facilities	3.48	3.79 L	6	3.60	4.07 L	3.78 L	3.78 L	4.02 L
	VFM: Shopping facilities	3.05	3.16	5	3.14	3.25	2.87 H	3.17	3.62 L
	Internet / Wi-Fi	3.75 H2	3.93 L	5	3.93 L	4.04 L	3.61	4.00 L	4.07 L
	Business/Executives Lounges	3.59 H2	3.90 L	6	3.89 L	3.98 L	3.78	3.83 L	4.20 L
	Availability of washrooms	3.89 H2	4.17 L	6	4.18 L	4.38 L	3.96	4.09 L	4.53 L
	Cleanliness of washrooms	3.71 H2	4.00 L	6	3.88 L	4.27 L	3.97 L	3.90 L	4.42 L
Airport Environment	Comfort of waiting/gate areas	3.68 H2	3.87 L	6	3.89 L	4.05 L	3.77	3.69	4.34 L
	Terminal cleanliness	3.94 L1/H2	4.15 L	6	4.11 L	4.36 L	4.18 L	3.97	4.58 L
Arrivals Services	Airport Ambience	3.67 H2	3.94 L	6	3.90 L	4.15 L	3.89 L	3.80 L	4.41 L
	Passport inspection	3.94 H2	4.01	4	3.90	4.20 L	3.82 H	3.99	4.41 L
	Baggage delivery speed	3.81 H2	3.75	4	3.59 H	3.98	3.61 H	3.87	4.01 L
	Customs inspection	3.86 H2	3.89	4	3.68 H	4.08	3.84	3.89	4.28 L

→ EWR also significantly underperforms the peer panel airports on passenger satisfaction overall and on most airport elements, although EWR's rank among the six peer airports is closer to the middle on: walking distance (3.86; rank 3), parking value for the money –VFM (2.95; 4), check-in wait-time (4.04; 4), security check ID/Ticket wait-time (4.03; 4), arrivals passport inspection (3.94; 4), arrivals customs inspection (3.86; 4), arrivals bag speed (3.81, 4).

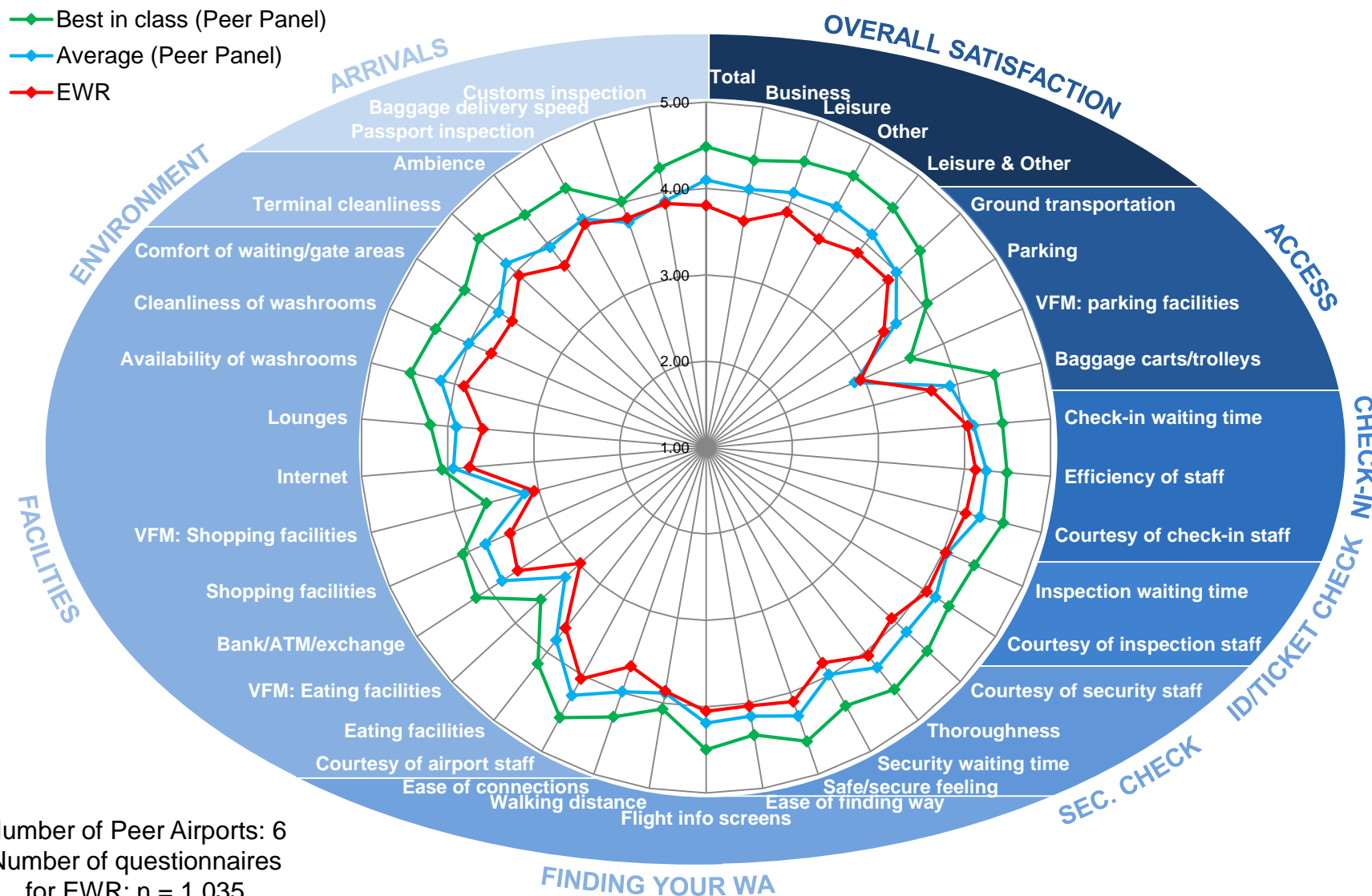
→ EWR outperforms only MUC on: ground transportation (3.71), parking facilities VFM (2.33), all three check-in elements, three of the four wayfinding elements (excluding connections-3.81), shopping facility VFM (2.87), arrivals bag speed (3.61) and passport inspection (3.82).

→ EWR satisfaction is on a par with other peer airports on: ground transportation (BOS), parking facilities (BOS/MSP/SEA), parking facilities VFM (BOS/MSP/SEA), security ID/ticket check-both elements (MSP/MUC/SEA), 3 of 4 security check elements (MUC, except on security check wait-time-3.94, also on a par with SEA-3.79), ease of finding way (SEA), walking distance (MSP/SEA), connections (MUC), airport staff courtesy (MUC), eating facilities (BOS), shopping facilities (BOS), shopping facilities VFM (BOS/MSP/SEA), Internet/Wi-Fi access (MUC), business lounges (MUC), restroom availability (MUC), comfort at gate (MUC/SEA), terminal cleanliness (SEA), arrivals passport inspection (BOS/SEA), arrivals customs inspection (MSP/MUC/SEA) and arrivals bag speed (MSP/SEA).

→ EWR trails YYZ overall and on all airport elements.

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. EWR N=1035.
H1/2; L1/2: Significantly Higher/Lower than Q1 2019/Q2 2018; EWR Q2 2019 H/L: Significantly Higher/Lower than Peer Panel/Airports; ~Rank against Peer Panel of 5 Airports.

EWR Performance vs. Peer Panel

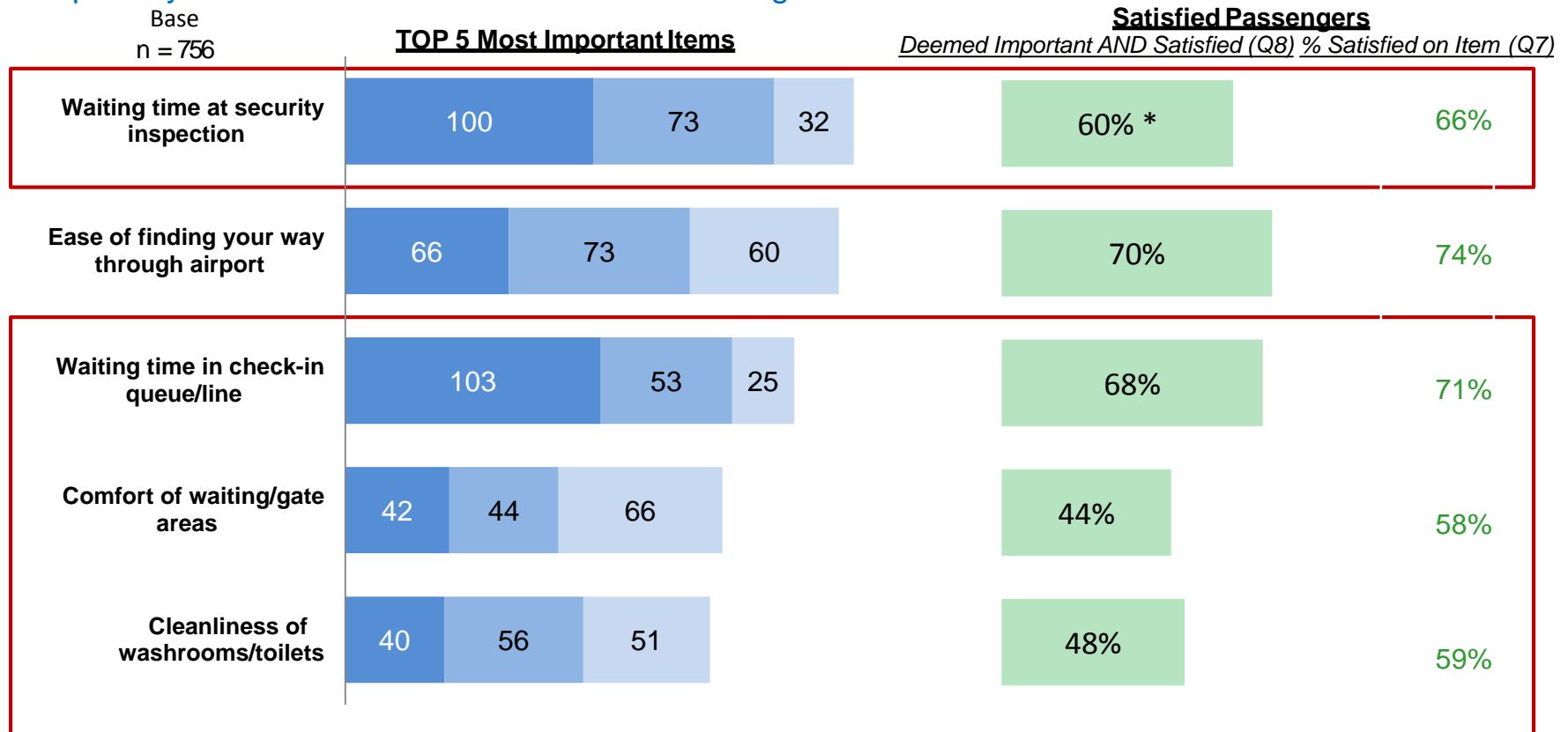


Number of Peer Airports: 6
 Number of questionnaires
 for EWR: n = 1,035

EW R– Airport Performance

Top 5 Most Important Items – Satisfied Passengers

- Four of the top five airport importance elements indicate a weakness for EWR (under 70% satisfaction for those who deem the item important): wait-time at security inspection, wait-time at check-in and especially restroom cleanliness and comfort of the gate area.



Notes: ■ 1st most important ■ 2nd most important ■ 3rd most important

Top 5: from Q8: "Which of the items listed in Question 7 are the 1st / 2nd / 3rd most important to you at this airport?"
The figures represent the number of respondents who mention the item.

Satisfied Passengers are among the respondents who mention the item as important at Q8.

Satisfied Passengers among the respondents to Q7 items "Based on your experience today, please rate this airport on each service item".

Base is Respondents providing a valid response

* Scores 4 + 5
(Excellent+ Very Good)



LGA Satisfaction Performance

LGA Airport Performance

LGA Q2-Q1
2019
Difference
(-) (+)

LGA Q2
2019-18
Difference
(-) (+)



		LGA Q2 2019	LGA Q2-Q1 2019 Difference (-) (+)		LGA Q2 2019-18 Difference (-) (+)	
Overall Satisfaction	Overall Satisfaction	3.65	L -0.16		0.17	H
	Business	3.39	L -0.26		0.15	
	Leisure	3.82	-0.11		0.23	H
	Other*	3.60	L -0.28		-0.14	
	Leisure & Other	3.77	L -0.14		0.17	H
Access	Ground transportation	3.31	-0.13		-0.07	
	Parking	3.07		0.08	0.07	
	VFM: Parking facilities	2.74		0.02	-0.09	
	Baggage carts/trolleys	3.24	-0.22		-0.23	
Check-in	Check-in waiting time	4.11	L -0.27		-0.03	
	Efficiency of staff	4.15	L -0.23		-0.04	
	Courtesy of check-in staff	4.15	L -0.15		0.05	
Security ID Check	Inspection waiting time	4.11	L -0.22		0.07	
	Courtesy of inspection staff	4.07	L -0.17		0.03	
Security	Courtesy of security staff	3.98	L -0.16		0.05	
	Thoroughness	4.06	L -0.17		-0.01	
	Security waiting time	3.99	L -0.25		0.07	
	Safe/secure feeling	4.19	L -0.12		0.07	
Finding Way	Ease of finding way	4.00	L -0.18		0.07	
	Flight info screens	4.02	L -0.20		0.05	
	Walking distance	3.94	L -0.13		-0.04	
	Ease of connections	4.01		0.02	0.02	
Airport Facilities	Courtesy of airport staff	4.03	L -0.22		0.01	
	Eating facilities	3.48	L -0.15		0.27	H
	VFM: Eating facilities	2.91	-0.04		0.24	H
	Availability Bank/ATM/exchange	3.39	-0.20		-0.03	
	Shopping facilities	3.31	-0.07		0.36	H
	VFM: Shopping facilities	2.98		0.08	0.28	H
	Internet / Wi-Fi	3.75	-0.05		0.32	H
	Business/Executives Lounges	3.40	-0.14		0.10	
	Availability of washrooms	3.78	L -0.18		0.16	H
	Cleanliness of washrooms	3.66	-0.11		0.13	H
Airport Environment	Comfort of waiting/gate areas	3.60	L -0.12		0.30	H
	Terminal cleanliness	3.76	L -0.11		0.18	H
Arrivals Services	Airport Ambience	3.48	-0.07		0.31	H
	Passport inspection	NA		NA	NA	
	Baggage delivery speed	3.70	-0.12		-0.10	
	Customs inspection	NA		NA	NA	

- LGA passenger satisfaction improved significantly overall (3.65) YOY (vs. Q2 2018) and among leisure travelers (3.82) as well as on nearly all airport facility elements except airport staff courtesy (4.03) ATMs/CurrencyExchanges (3.39) and business lounges (3.40). The three previously mentioned elements and all the remaining airport elements appear steady.
- However, satisfaction overall (3.65) and among business travelers (3.39) declined significantly since last quarter (Q1 2019), as did many airport elements: all check-in elements, all security check elements, nearly all wayfinding elements except connections (4.01), airport staff courtesy (4.03), eating facilities (3.48), restroom availability (3.78), comfort at the gate (3.60) and terminal cleanliness (3.76). The remaining airport elements remained steady since last quarter.
- Safe/secure feeling at the security check (4.19) is the highest scoring element in Q2 2019; parking facilities VFM, is the lowest scoring (2.74).

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: Q2 2019 (N=989) significantly Higher/Lower than Q1 2019 or Q2 2018.

LGA Airport Performance vs. Peer Panel

		Peer		LGA					
			Panel	Rank ~	BOS	BWI	MSP	PHL	
Overall Satisfaction	Overall Satisfaction	3.65 L1/H2	4.07 L	5	4.10 L	4.18 L	4.32 L	3.94 L	
	Business	3.39 L1	4.00 L	5	4.04 L	4.03 L	4.24 L	3.86 L	
	Leisure	3.82 H2	4.11 L	5	4.13 L	4.26 L	4.33 L	3.95 L	
	Other*	3.60 L1	4.10 L	5	4.08 L	4.13 L	4.44 L	4.02 L	
	Leisure & Other	3.77 L1/H2	4.10 L	5	4.12 L	4.23 L	4.35 L	3.97 L	
Access	Ground transportation	3.31	4.02 L	5	3.92 L	4.17 L	4.15 L	4.04 L	
	Parking	3.07	3.76 L	5	3.46 L	4.19 L	3.79 L	3.73 L	
	VFM: Parking facilities	2.74	3.22 L	4	2.68	3.76 L	3.09	3.33 L	
	Baggage carts/trolleys	3.24	3.87 L	5	3.87 L	4.01 L	3.86 L	3.79 L	
Check-in	Check-in waiting time	4.11 L1	4.18	1	4.14	4.19	4.26 L	4.19	
	Efficiency of staff	4.15 L1	4.26 L	2	4.25 L	4.28 L	4.43 L	4.23	
	Courtesy of check-in staff	4.15 L1	4.22	2	4.24 L	4.25	4.45 L	4.13	
Security ID Check	Inspection waiting time	4.11 L1	4.15	2	4.19	4.18	4.39	4.08	
	Courtesy of inspection staff	4.07 L1	4.13	2	4.18 L	4.11	4.28	4.09	
Security	Courtesy of security staff	3.98 L1	4.10 L	2	4.14 L	4.07	4.29 L	4.03	
	Thoroughness	4.06 L1	4.20 L	3	4.23 L	4.17 L	4.30 L	4.16 L	
	Security waiting time	3.99 L1	4.05	1	4.02	4.03	4.16 L	4.05	
	Safe/secure feeling	4.19 L1	4.27 L	2	4.24	4.30 L	4.40 L	4.25	
Finding Way	Ease of finding way	4.00 L1	4.29 L	5	4.24 L	4.45 L	4.29 L	4.25 L	
	Flight info screens	4.02 L1	4.28 L	5	4.24 L	4.34 L	4.38 L	4.26 L	
	Walking distance	3.94 L1	3.95	1	4.07 L	4.07 L	3.84	3.81 H	
	Ease of connections	4.01	4.00	2	3.95	4.25	3.96	3.87	
Airport Facilities	Courtesy of airport staff	4.03 L1	4.23 L	3	4.23 L	4.27 L	4.35 L	4.16 L	
	Eating facilities	3.48 L1/H2	3.90 L	5	3.65 L	4.14 L	4.10 L	3.91 L	
	VFM: Eating facilities	2.91 H2	3.35 L	5	3.24 L	3.64 L	3.35 L	3.29 L	
	Availability Bank/ATM/exchange	3.39	3.84 L	5	3.89 L	3.80 L	3.78 L	3.83 L	
	Shopping facilities	3.31 H2	3.78 L	5	3.60 L	3.90 L	4.07 L	3.79 L	
	VFM: Shopping facilities	2.98 H2	3.22 L	5	3.14 L	3.33 L	3.25 L	3.22 L	
	Internet / Wi-Fi	3.75 H2	3.88 L	4	3.93 L	3.80	4.04 L	3.82	
	Business/Executives Lounges	3.40	3.88 L	5	3.89 L	3.65	3.98 L	3.94 L	
	Availability of washrooms	3.78 L1/H2	4.15 L	5	4.18 L	4.21 L	4.38 L	4.03 L	
	Cleanliness of washrooms	3.66 H2	3.81 L	4	3.88 L	3.90 L	4.27 L	3.57	
Airport Environment	Comfort of waiting/gate areas	3.60 L1/H2	3.84 L	5	3.89 L	3.88 L	4.05 L	3.72 L	
	Terminal cleanliness	3.76 L1/H2	4.07 L	4	4.11 L	4.24 L	4.36 L	3.87 L	
Arrivals Services	Airport Ambience	3.48 H2	3.90 L	5	3.90 L	4.05 L	4.15 L	3.76 L	
	Passport inspection	NA	4.02	NA	3.90	4.17	4.20	4.05	
	Baggage delivery speed	3.70	3.66	2	3.59	3.74	3.98 L	3.62	
	Customs inspection	NA	3.81	NA	3.68	3.94	4.08	3.88	

→ LGA significantly under-performs the peer panel airports on passenger satisfaction overall and on most airport elements, while it does not outperform any of the peer airports on any airport elements (receding from some strength seen in last quarter – Q1 2019). Please note, FFL is not present in this quarter's results-Q2 2019)

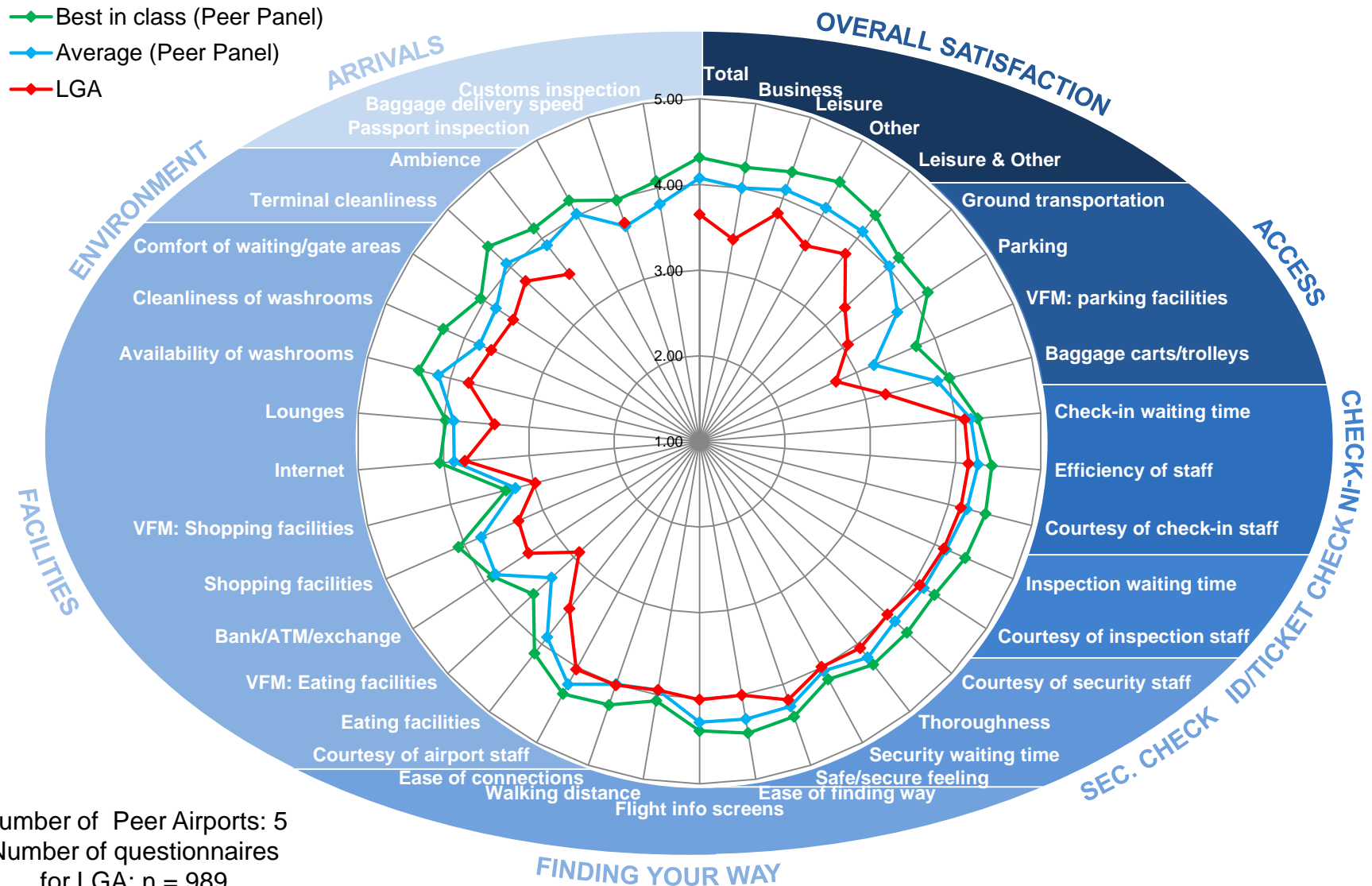
→ However, LGA's rank against the four peer airports, appears quite strong, performing on a par with other peer airports on: check-in wait-time (4.11, rank 1 – BOS/BWI), security check wait time (3.99, rank 1–BOS/MSP/ PHL), walking distance (3.94, rank 1 – MSP), check-in staff efficiency (4.11, rank 2 – PHL), check-in staff courtesy (4.07, rank 2 – BWI/PHL), TSA courtesy (3.98, rank 2– BWI/ PHL), safe/secure feeling (4.19, rank 2 – BOS/PHL), connections (4.01, rank 2 – BOS/BWI/MSP/ PHL), arrivals bag speed (3.70, rank 2 – BOS/BWI/PHL).

→ LGA also performs on a par on with the peer airports on these airport elements: parking facilities VFM (BOS/MSP), Internet/Wi-Fi access (BWI), business lounges (BWI), Restroom cleanliness (PHL).

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; H/L:LGA Q2 2019 Significantly Higher/Lower than Peer Panel/Airports; ~ Rank against Peer Panel of 4 airports (FFL excluded).

LGA Q2 2019 N=989.

LGA Performance vs. Peer Panel

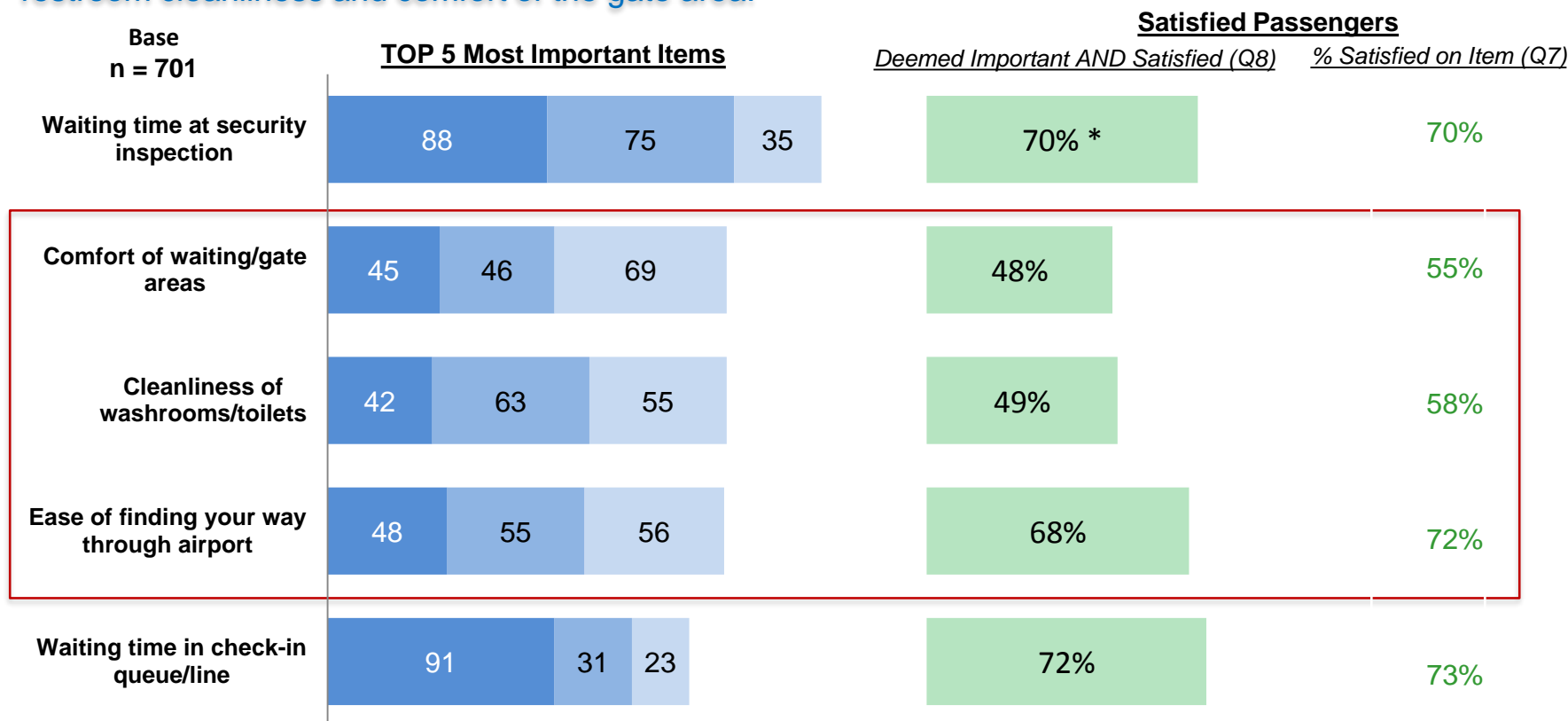


Number of Peer Airports: 5
Number of questionnaires
for LGA: n = 989

LGA– Airport Performance

Top 5 Most Important Items – Satisfied Passengers

- Three of the top five airport importance elements below indicate a weakness for LGA (under 70% satisfaction for those who deem the item important): Ease of finding way through airport and especially restroom cleanliness and comfort of the gate area.



Notes: ■ 1st most important ■ 2nd most important ■ 3rd most important

Top 5: from Q8: "Which of the items listed in Question 7 are the 1st / 2nd / 3rd most important to you at this airport?"
The figures represent the number of respondents who mention the item.

Satisfied Passengers are among the respondents who mention the item as important at Q8.

Satisfied Passengers among the respondents to Q7 items "Based on your experience today, please rate this airport on each service item".

Base is Respondents providing a valid response

* Scores 4 + 5
(Excellent+
Very Good)

Thank You!



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