J.D. POWER

North America Airport
Satisfaction Study

Understanding what pleases the flying public and where their priorities lie are the first steps in creating an outstanding airport experience.

NORTH AMERICA AIRPORT SATISFACTION STUDY

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Why do passengers love going to some airports and dread going to others? Understanding what pleases the flying public and where their priorities lie are the first steps in creating an outstanding airport experience. Armed with this knowledge, airport managers and administrators can shape the entire customer experience to be as easy, pleasant, and rewarding as possible: from getting to the airport, to checking in, going through security, shopping and eating in the terminal, and getting to the gate.

The Solution

The *J.D. Power North America Airport Satisfaction Study*^{SM} measures passengers' satisfaction with their airport experience among Mega-, Large-, and Medium-size airports in North America. The study provides actionable insights that can support industry stakeholders in improving their performance and passengers' overall airport experience.

Objectives of the study include:

- Quantifying the factors that drive overall satisfaction among North American air travelers
- Establishing the relative importance of each factor to overall satisfaction
- Determining the performance of Mega-, Large-, and Medium-size airports in North America
- Developing a prioritized action plan for improvement

How It Works

Sampling
North American airports are grouped in three segments, based on annual passenger volume as measured by the Airports Council International:

- Mega: 32 million or more passengers per year
- Large: 10 million to 31.5 million passengers per year
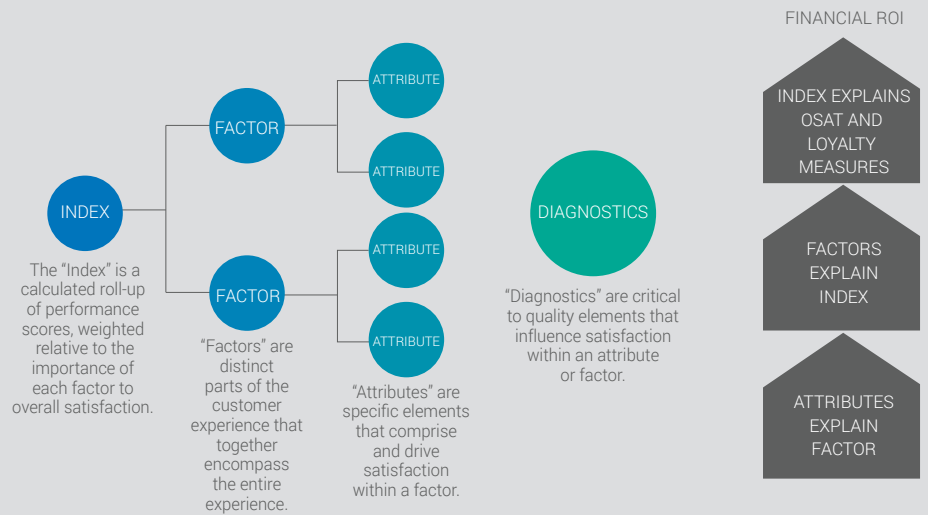- Medium: 4 million to 9.9 million passengers per year

Based on data obtained from the survey, an index is created that quantifies the impact that the factors and the attributes within them have on customer satisfaction.

Online surveys are conducted with North American air travelers in four waves. Fielding is continuous, beginning in October and running through July. Survey respondent data captures travel experiences within the past 30 days.

Refer to the Appendix to see a list of airports included in the study.

J.D. Power Index

Based on data obtained from the survey, an index is created that quantifies the impact that the factors and the attributes within them have on customer satisfaction. Specifically, the relative weight that each attribute contributes to the factor index is first calculated, followed by calculating the relative weight each factor contributes to the overall satisfaction index. The results of those calculations are used to predict overall satisfaction based on a weighted sum of the factors, which constitutes the overall index.

FINANCIAL ROI

INDEX

The "Index" is a calculated roll-up of performance scores, weighted relative to the importance of each factor to overall satisfaction.

FACTOR

"Factors" are distinct parts of the customer experience that together encompass the entire experience.

ATTRIBUTE

"Attributes" are specific elements that comprise and drive satisfaction within a factor.

DIAGNOSTICS

"Diagnostics" are critical to quality elements that influence satisfaction within an attribute or factor.

INDEX EXPLAINS OSAT AND LOYALTY MEASURES

FACTORS EXPLAIN INDEX

ATTRIBUTES EXPLAIN FACTOR

Award Criteria

For an airport to be award eligible, it must have a minimum of 100 completed surveys. The highest-ranked Mega-, Large-, and Medium-sized airports will receive a trophy. Award recipients that subscribe to the study will have the opportunity to publicly leverage this award through J.D. Power's award licensing program.

KPIs are individual diagnostic items that have the most significant relationship with a passenger's airport overall experience.

Industry Best Practices

Key Performance Indicators (KPIs) and diagnostics provide in-depth analyses of customer needs and preferences at each service "moment of truth" by identifying the top service practices. This information has proven to be invaluable in helping airports prioritize strategies that target the areas most important to customers.

KPIs are individual diagnostic items that have the most significant relationship with a passenger's overall airport experience. The KPI break point is the specific point at which satisfaction significantly improves, and indicates a best practice.

Leveraging J.D. Power Data to Better Understand Competitive Position

Satisfaction Drivers

The North America Airport Satisfaction Study Index groups the passenger experience into seven factors:

- Airport Accessibility—Getting to the airport/leaving the airport

- Check-In/Baggage Check (as applicable)

- Security Check

- Food, Beverage and Retail

- Terminal Facilities (Concourses, lounges, signage, restrooms, gate areas)

- Baggage Claim (as applicable)

Oversampling

J.D. Power offers a proprietary oversample opportunity allowing airports that are not currently profiled in the syndicated study to obtain competitive data sets in order to benchmark their performance against peer airports that are profiled in the study. This opportunity is also available for profiled airports that would like to dive deeper into a specific topic covered in the study. The same questionnaire used for the syndicated study is used for the proprietary oversample study.

Subscription Details

The *North America Airport Satisfaction Study* provides access to the insights and tools needed to gain a comprehensive, in-depth understanding of how your airport is performing and to identify critical areas needing improvement.

Study deliverables include:

- A webcast presentation that provides insights into key industry trends and study findings, allowing your airport to maximize performance and create a highly satisfying passenger experience

- Access to a personalized competitive data set allowing you to see how your airport stacks up against competitors, the industry, and the highest performers across the seven study factors at the national level

- Access to online data portals for in-depth data analysis

- An on-site executive presentation with management insights, which include customized strategic recommendations, study results, ongoing best practices, and analyses of high-performing airports

ABOUT J.D. POWER

J.D. Power is a global leader in consumer insights, advisory services and data and analytics. These capabilities enable J.D. Power to help its clients drive customer satisfaction, growth and profitability. Established in 1968, J.D. Power has offices serving North America, South America, Asia Pacific and Europe.

OUR EXPERIENCE

J.D. Power has been capturing and analyzing the Voice of the Customer for 50 years. Through our proprietary index model, the many drivers of the customer experience are identified, accurately measured, and linked to business results. Based on our findings, we provide clients with insights that can lead to an improvement in their financial performance.

Airports that subscribe to the study will be better able to understand their competitive position at a detailed level, allowing them to pinpoint critical areas for improvement and make prudent investments in the service attributes that matter most to customers.

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For more information about J.D. Power products and services, please contact your J.D. Power account manager.

APPENDIX: Profiled Brands

Mega airports
- Charlotte/Douglas International Airport (CLT)
- Dallas/Fort Worth International Airport (DFW)
- Denver International Airport (DEN)
- Detroit Metropolitan Wayne County Airport (DTW)
- George Bush Intercontinental Airport (IAH)
- Hartsfield-Jackson Atlanta International Airport (ATL)
- John F. Kennedy International Airport (JFK)
- Logan International Airport (BOS)
- Los Angeles International Airport (LAX)
- McCarran International Airport (LAS)
- Miami International Airport (MIA)
- Minneapolis-Saint Paul International Airport/Wold (MSP)
- Newark Liberty International Airport (EWR)
- O'Hare International Airport (ORD)
- Orlando International Airport (MCO)
- Phoenix Sky Harbor International Airport (PHX)
- San Francisco International Airport (SFO)
- Seattle-Tacoma International Airport (SEA)
- Toronto Pearson International Airport (YYZ)

Large airports
- Austin-Bergstrom International Airport (AUS)
- Baltimore-Washington International Thurgood Marshall Airport (BWI)
- Calgary International Airport (YYC)
- Chicago Midway International Airport (MDW)
- Dallas Love Field (DAL)
- Fort Lauderdale-Hollywood International Airport (FLL)
- Honolulu International Airport (HNL)
- John Wayne Airport, Orange County (SNA)
- Kansas City International Airport (MCI)
- LaGuardia Airport (LGA)
- Louis Armstrong New Orleans International Airport (MSY)

- Montréal-Pierre Elliott Trudeau International Airport (YUL)
- Nashville International Airport (BNA)
- Oakland International Airport (OAK)
- Philadelphia International Airport (PHL)
- Portland International Airport (PDX)
- Raleigh-Durham International Airport (RDU)
- Ronald Reagan Washington National Airport (DCA)
- Sacramento International Airport (SMF)
- Salt Lake City International Airport (SLC)
- San Diego International Airport (SAN)
- San Jose International Airport (SJC)
- St. Louis Lambert International Airport (STL)
- Tampa International Airport (TPA)
- Vancouver International Airport (YVR)
- Washington Dulles International Airport (IAD)
- William P. Hobby Airport (HOU)

Medium aiports
- Albuquerque International Sunport (ABQ)
- Bradley International Airport (BDL)
- Buffalo Niagara International Airport (BUF)
- Cincinnati/Northern Kentucky International Airport (CVG)
- Cleveland Hopkins International Airport (CLE)
- Edmonton International Airport (YEG)
- General Mitchell International Airport (MKE)
- Indianapolis International Airport (IND)
- Jacksonville International Airport (JAX)
- John Glenn Columbus International Airport (CMH)
- Kahului Airport (OGG)
- Ottawa/Macdonald-Cartier International Airport (YOW)
- Palm Beach International Airport (PBI)
- Pittsburgh International Airport (PIT)
- San Antonio International Airport (SAT)
- Southwest Florida International Airport (RSW)
- Ted Stevens Anchorage International Airport (ANC)