ACI-North America CEO Forum 2019

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Globally Benchmarking Your Airport for Customer Service

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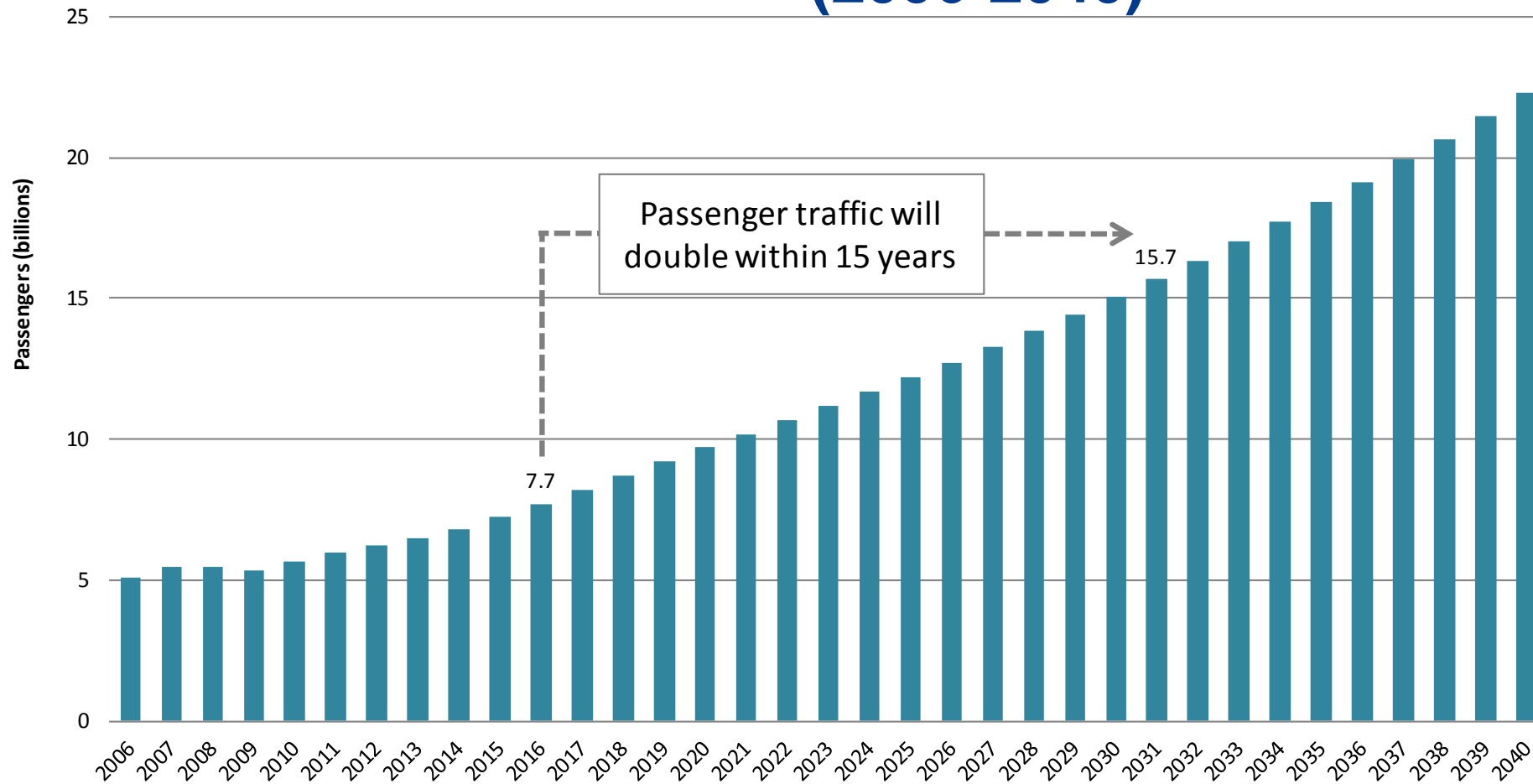**Deputy Director General, Programmes and Services**

ACI World

High Competitive Airport Environment

- **Destination competition** – leisure tourism can switch to other destinations if the cost of travel is too high (or quality of service too low).
- **Routes development** – Convincing airlines of profitability of new routes and positive business model to attract new routes & airlines.
- **Competition for non-aeronautical services** (retail, car parking, etc.) with non-airport providers.
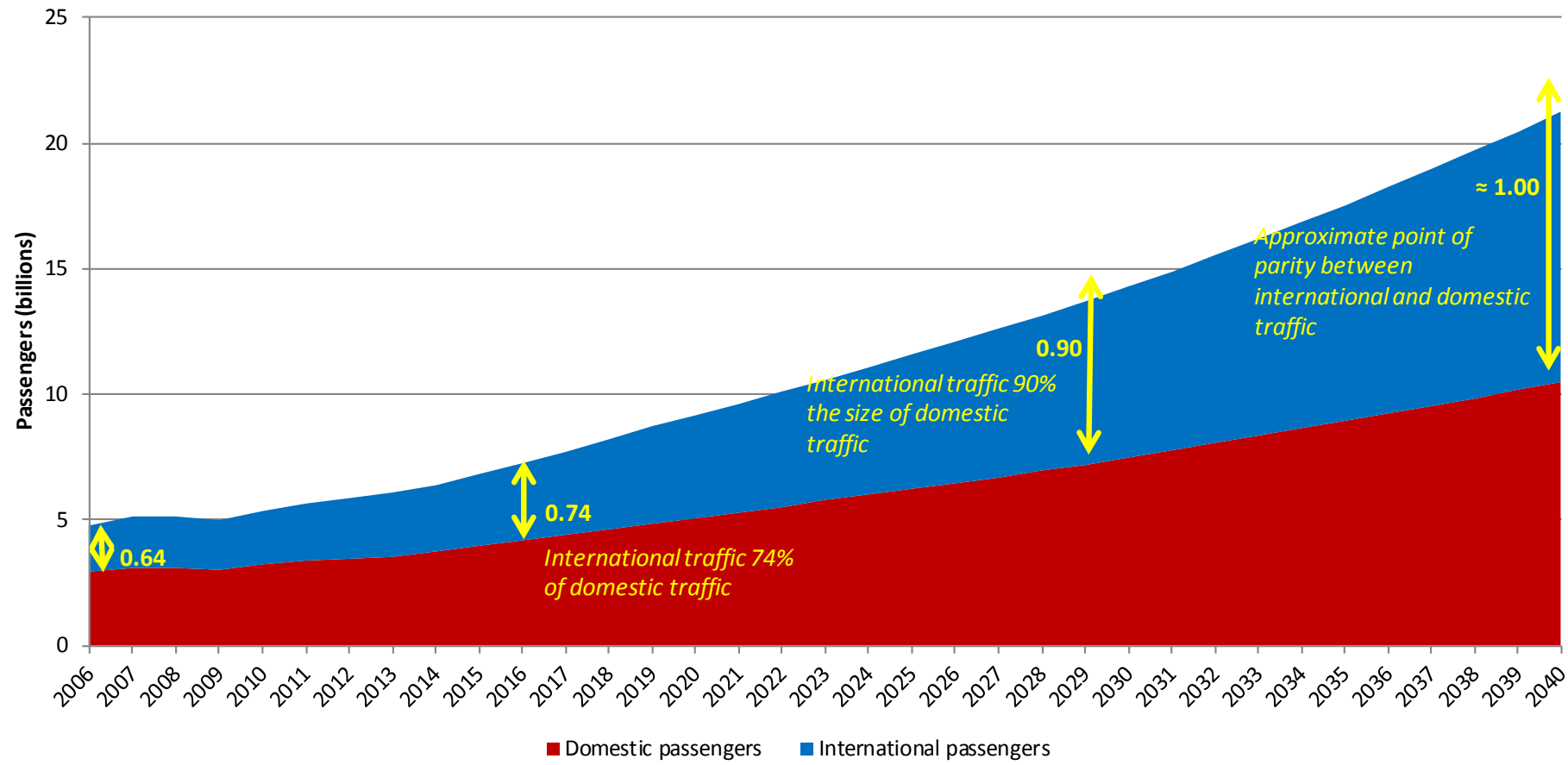- **Modal competition** – e.g. Car, rail for certain routes, others.

Total passenger traffic data and forecast (2006-2040)

Passenger traffic will double within 15 years

7.7

15.7

Passengers (billions)

Total passengers

Forecasted ratio of international to domestic passenger traffic (2006-2040)

Source: ACI World Airport Traffic Forecast (WATF)

NEXTT

A vision for the future of air travel and technologies
aci.aero/nextt

Industry Stakeholders

OFF-AIRPORT ACTIVITIES

Flexibility in what can happen before and beyond airport

→

ADVANCED PROCESSING

Increasing use of digital identity management, automation and robotics

→

INTERACTIVE DECISION MAKING

Linking everything together with trusted, real-time data throughout the journey

→

CARGO

Efficient operations and modern technologies support easier, smarter and faster movement of cargo

→

BAGGAGE

Convenient and hassle free handling and tracking of baggage for passengers, with greater choice of services offerings

→

PASSENGER

A seamless, secure and efficient walking pace journey that is highly personalized throughout

→

AIRCRAFT

Fully coordinated airport turnaround processes, using the latest in automation and environmentally friendly technologies, to increase predictability

COMING SOON

klantenservice klientu apkalpošana serviço ao cliente

müşteri servisi khidmat pelanggan servicio al cliente

vevőszolgálat servei d'atenció al client service clients

servizzi tal Konsumatur Kundendienst 고객 서비스

顧客サービス خدمة الزبائن Þjónustuver obsługa klienta

služba za korisnike customer service serviciu clienți

shërbimi ndaj klientit asiakaspalvelu assistenza clienti

שירות לקוחות 客户服务 Услуги на клиентите บริการลูกค้า

služby zákazníkům ग्राहक सेवा bezeroarentzako zerbitzua

обслуживание клиентов kunde service kundeservice

klientų aptarnavimas kundservice servizo ao cliente

εξυπηρέτηση πελατών 客戶服務 pelayanan pelanggan

Customer Service & Customer Experience

"People will forget what you said, people will forget what you did, but people will never forget how you made them feel."
— Maya Angelou

- Based on analyses of 500,000 passenger responses to the ASQ Survey
- Sample of 108 airports participating in ACI's annual Airport Economics Survey
- Identification of the most influential customer service elements to grow NAR

Does passenger satisfaction increase
Airport non-aeronautical revenues?
A comprehensive assessment

Research report

Return on Experience - ROE
## Comparing the ways airports can grow NAR

- **Impact of Number of Passengers:**
  An increase of **1%** in the number of passengers leads to a growth of non-aeronautical revenues ranging from **0.7% to 1%** - contributing a proportional growth;
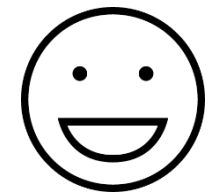
- **Impact of Size of Retail Area**
  An increase of 1% in the physical size of the floorspace of the airport's commercial area leads to a growth of non-aeronautical revenue of **0.2%**;
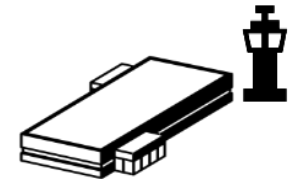
- **Impact of Customer Satisfaction**
  An increase of **1%** in the global passenger satisfaction mean, as defined in the ASQ Survey, generates on average a growth of non-aeronautical revenue of **1.5%**.

Available tools to measure and/or manage airport customer service and experience

"Asking"
- **Surveys**
- **Focus groups / interviews**

"Listening"
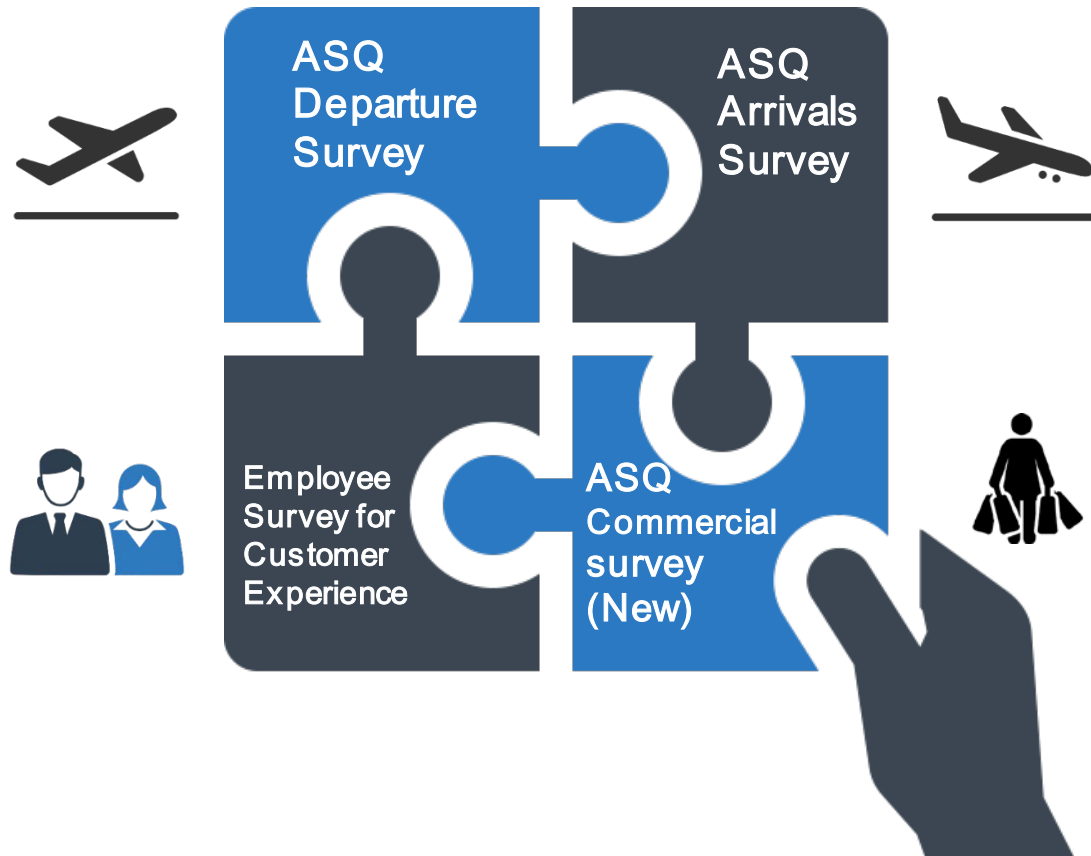- **Social media monitoring**
- **Observation**

"Expert"
- **Personalised on site assessments**
- **Qualitative VS Quantitative**

# Who provides such services ?

- **Airports (internally)**

- **ACI ASQ Program**

- **Other private entities**

- **Combination**

ACI ASQ: A suite of customer experience solutions

- **Airport Customer Experience Accreditation (New)**

- **Passenger Persona profiling**

- **Terminal Analysis**

- **Dissatisfied passenger probe**

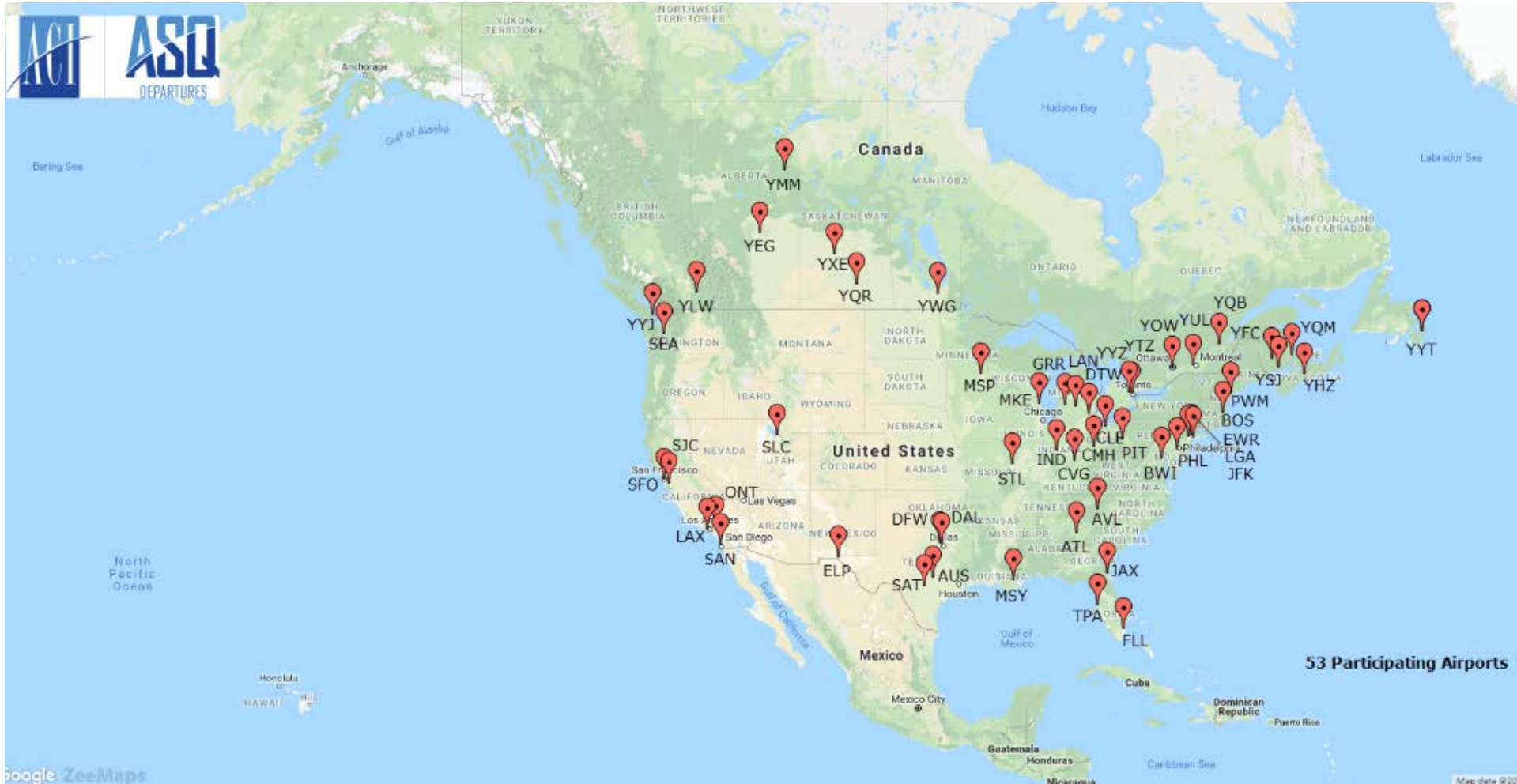- **Customized on-site assessments**

ASQ Membership Numbers

Present in 387 airports, in 90 countries
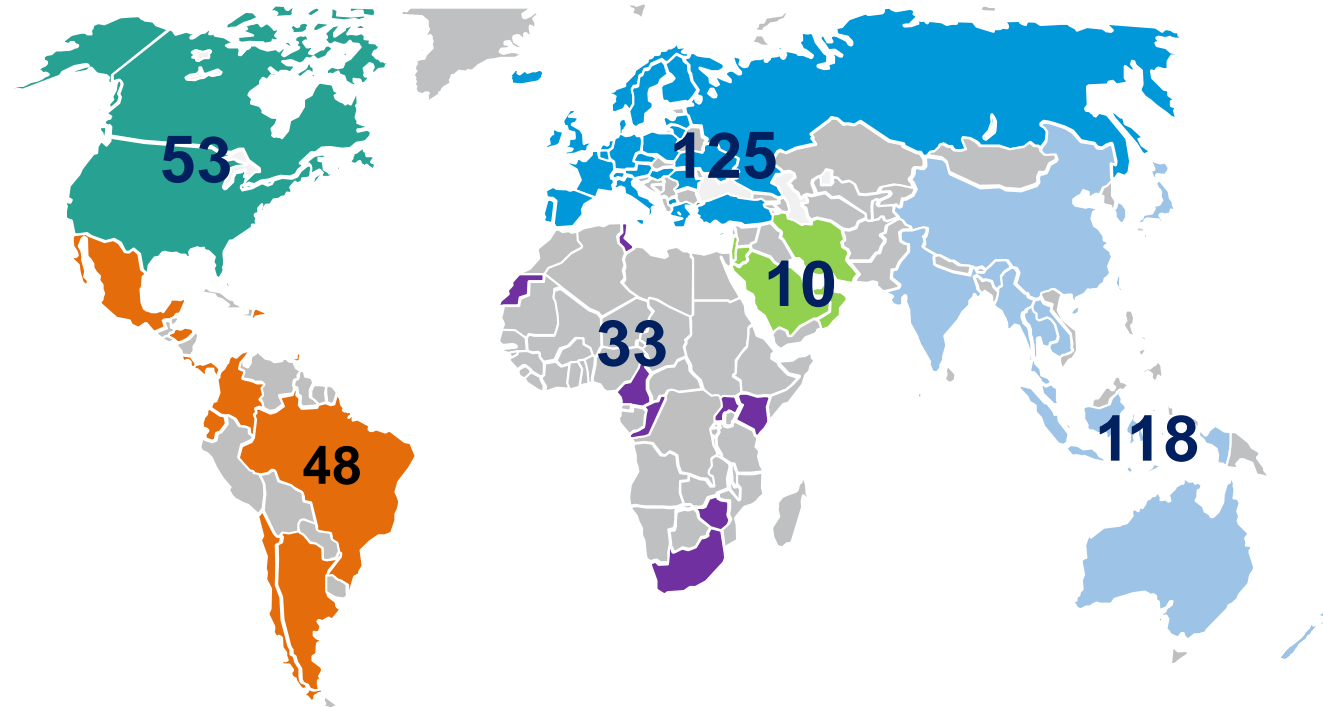
ASQ Departures: 387 airports

ASQ Arrivals: 13 airports

ACI Employee Survey for Customer Experience: 4 airports

ACI Airport Customer Experience Accreditation: 6 airports

53 Participating Airports

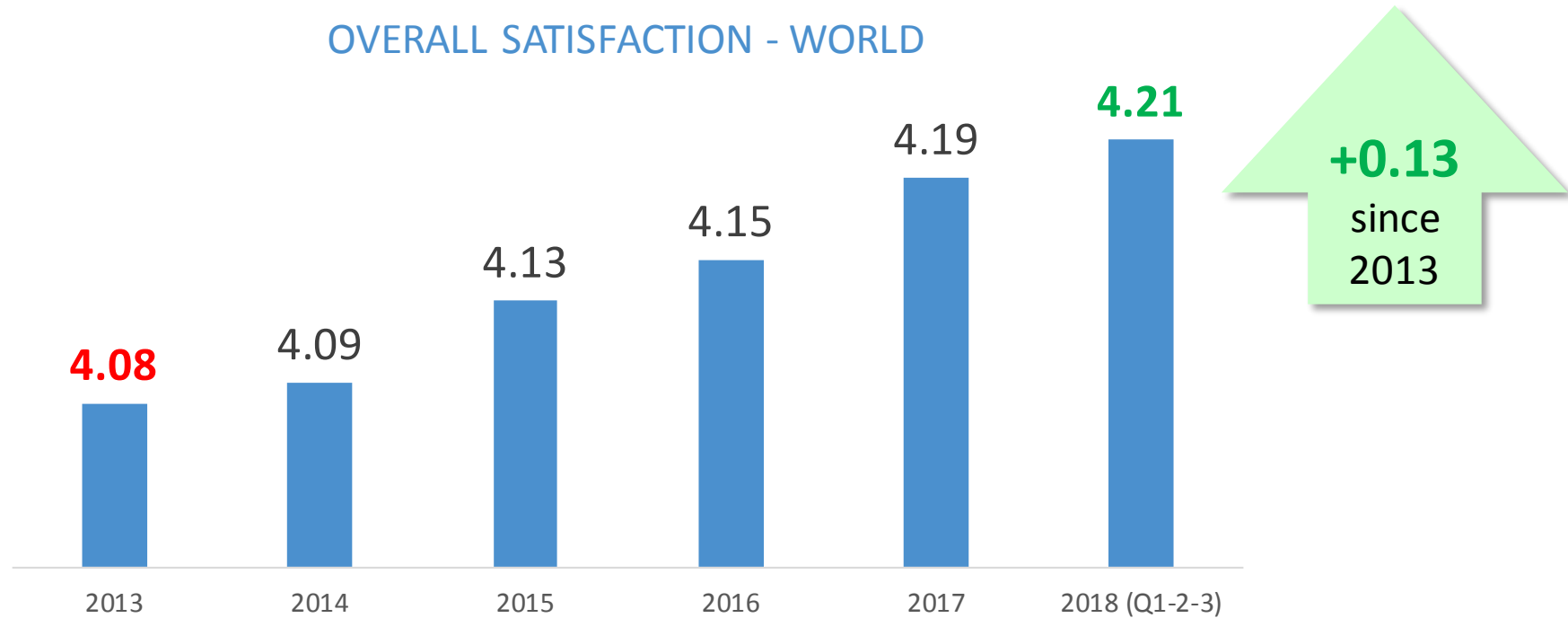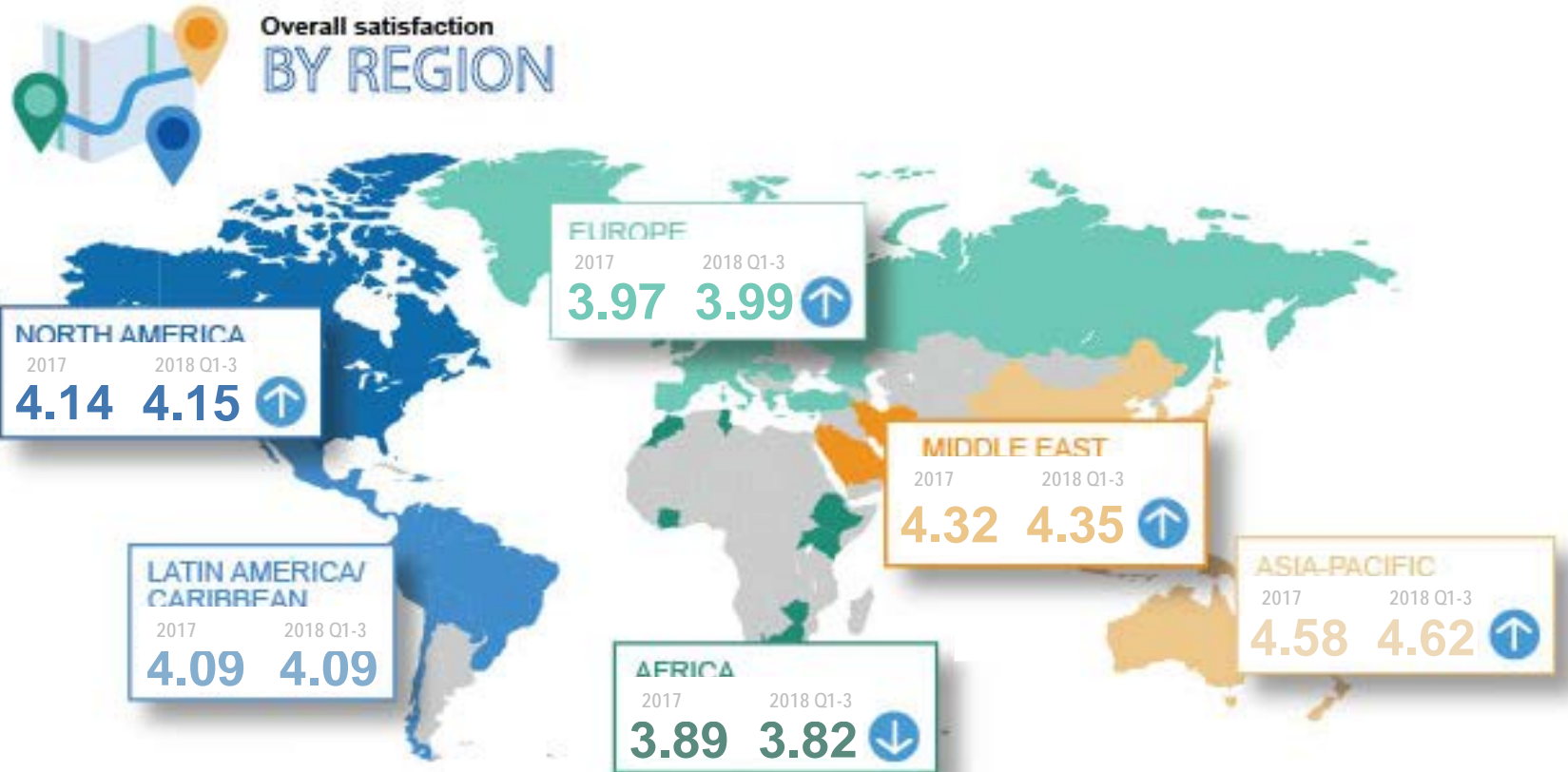# Evolution in Overall Satisfaction - World

Overall satisfaction score

All participating airports combined – the passengers' overall satisfaction has increased on a continuous basis during the past 5 years.

OVERALL SATISFACTION - WORLD

Year	Score
2013	4.08
2014	4.09
2015	4.13
2016	4.15
2017	4.19
2018 (Q1-2-3)	4.21

+0.13 since 2013

Evolution in Overall Satisfaction – Regions

ASQ BAROMETER Q1 - Q4 2018

Overall satisfaction BY REGION

EUROPE
2017: 3.97   2018 Q1-3: 3.99 ↑

NORTH AMERICA
2017: 4.14   2018 Q1-3: 4.15 ↑

MIDDLE EAST
2017: 4.32   2018 Q1-3: 4.35 ↑

LATIN AMERICA/CARIBBEAN
2017: 4.09   2018 Q1-3: 4.09

ASIA-PACIFIC
2017: 4.58   2018 Q1-3: 4.62 ↑

AFRICA
2017: 3.89   2018 Q1-3: 3.82 ↓

Results are means on a 5-point scale.
↑↓ indicates that the segment's performance is higher or lower compared to the 2017 result on a statistically significant level (95%).
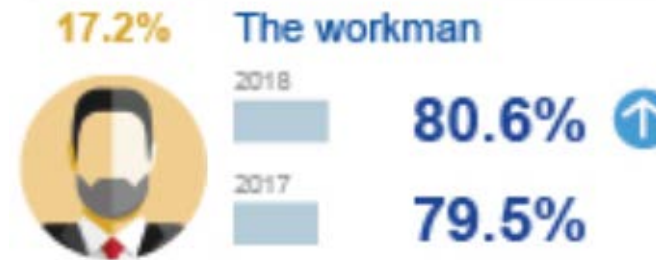
ASQ Airport Persona

24.3% The sunlounge tourist
2018 **82.7%** ↑
2017 **82.4%**

- New experiences, especially in retail and F&B
- Maximizing convenience
- Engaging and entertaining activities

17.2% The workman
2018 **80.6%** ↑
2017 **79.5%**

- Functional operations
- Minimized waiting time
- Maximized opportunity to be productive

19.3% The friendly vacationer
2018 **87.1%** ↑
2017 **85.3%**

- Minimizing stress
- Clear processes
- Efficiency tempered with friendliness

12.8% The timekeeper
2018 **86.5%** ↑
2017 **85.1%**

- Minimizing stress
- Clear processes
- Efficiency tempered with friendliness

17.6% The airport enthusiast
2018 **84.6%** ↓
2017 **86.7%**

- Clear procedures, minimal wait times
- Connectivity
- Ambiance
- Retail and F&B quality

8.9% The value seeker
2018 **79.2%** ↑
2017 **78.0%**

- Choice and value of retail offer
- Clear communication of offers
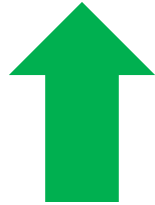- Retail and F&B quality

Evolution of Satisfaction per Service Attribute

Over the last 5 years, satisfaction key items variations:

WORLD

(ALL REGIONS INCLUDED)

NORTH AMERICAN AIRPORTS

Internet access / Wi-Fi **(+0.42)**

Business/Executive lounges **(+0.30)**

Availability of ATM/Money changers **(+0.26)**

VFM Shopping facilities **(+0.25)**

VFM Eating facilities **(+0.23)**

Restaurants/Eating facilities **(+0.21)**

Walking distance **(+0.21)**

Availability of carts/trolleys **(+0.19)**

etc....

No significant **decrease** of performance on any attribute.

Internet access/Wi-Fi **(+0.12)**

Feeling of being safe and secure **(+0.06)**

Walking distance **(+0.05)**

Thoroughness of security inspection **(+0.04)**

Waiting time at security inspection **(+0.04)**

Ease of making connections with other flights **(-0.10)**

Ground transportation to/from airport **(-0.10)**

Parking facilities **(-0.07)**

Waiting time in check-in queue **(-0.06)**

Courtesy & helpfulness of check-in staff **(-0.05)**

Cleanliness of washrooms **(-0.05)**

Cleanliness of airport terminal **(-0.05)**

Passenger Satisfaction Drivers World vs Regions

	World	North America	Europe	Asia	Middle Est	Latina America & Caribbean	Africa
Human factor (Airport community)	**18.0%**	**18.8%**	**18.9%**	15.4%	**19.0%**	14.8%	**20.5%**
Service environment / Atmosphere factor	**42.5%**	**43.5%**	**43.7%**	41.0%	39.6%	**47.3%**	37.9%
Discretionary time: Retail & Food and beverage,	**20.0%**	17.9%	18.0%	**21.8%**	**21.6%**	**20.9%**	17%
Others (Accessibility & Security process)	**19.5%**	**19.8%**	19.4%	**21.8%**	**19.8%**	16.90%	23.7%
Total	**100%**	100%	100%	100%	100%	100%	100%

* Marginal Impact Analysis

Key Points for Best Success:

- Data bases decision making
- Identify key triggers for change & improvement
- Benchmarking yourself over time and with other airports
- Stakeholder implication & integration
- Feeding into Business Intelligence (BI)

"The world is moved not only by the mighty shoves of the heroes, but also by the aggregate of the tiny pushes of each honest worker."

- Helen Keller

"Repeat business or behavior cannot be bribed. Loyalty has to be earned."

- Janet Robinson, New York Times Company

Let's continue to improve our airport experience and increase the airport competitiveness !

"Two important things are to have a genuine interest in people and to be kind to them. Kindness, I've discovered, is everything."

- Isaac Bashevis, Author

"Ask your customers to be part of the solution, and don't view them as part of the problem."

- Alan Weiss, Author

THANK YOU

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