



Overall satisfaction WORLDWIDE

Global snapshot of airport customer experience satisfaction, produced by ACI ASQ

2022

4.32 ↓

2021

4.38

An overall decline in the satisfaction scores is observed in 2022

An overall decline is observed in 2022, suggesting that passenger satisfaction is gradually returning to pre-pandemic levels. However, the overall score remains higher than pre-COVID (2019 was 4.24), showing that passengers are satisfied with the airport experience despite the challenges.

2022 has been an important turning point in the recovery of the COVID-19 pandemic. As mentioned in the *ASQ 2022 Global Traveller Survey*, there has been numerous positive indicators towards recovery for the travel industry: more people are travelling, more people are planning to travel, and the trend that travellers are planning to travel less than before the pandemic is slowly reversing.

As most world regions have continued to ease or remove travel restrictions, the recovery of passenger traffic has accelerated sharply, including major concentrations over peak periods. This has been highly challenging for many airports and their operational partners. Hampered by staff shortages and processes still not fully aligned across the different stakeholders, many airports suffered a degraded customer experience. This included crowded airports with long waiting lines at every step of the journey and an increase in flight delays and cancellations. The experience offered in the

commercial area has also generated a lot of dissatisfaction as many concessions had to stop or reduce their activities during the pandemic, resulting in a deceiving experience at this stage of the journey.

Solutions that will allow passengers to have a feeling of greater control over their airport journey will contribute to reducing their level of anxiety. Providing them with real-time information will help them take necessary action for having a frictionless experience; while technology and automation could help them own certain processes and reduce dependence on airport staff.

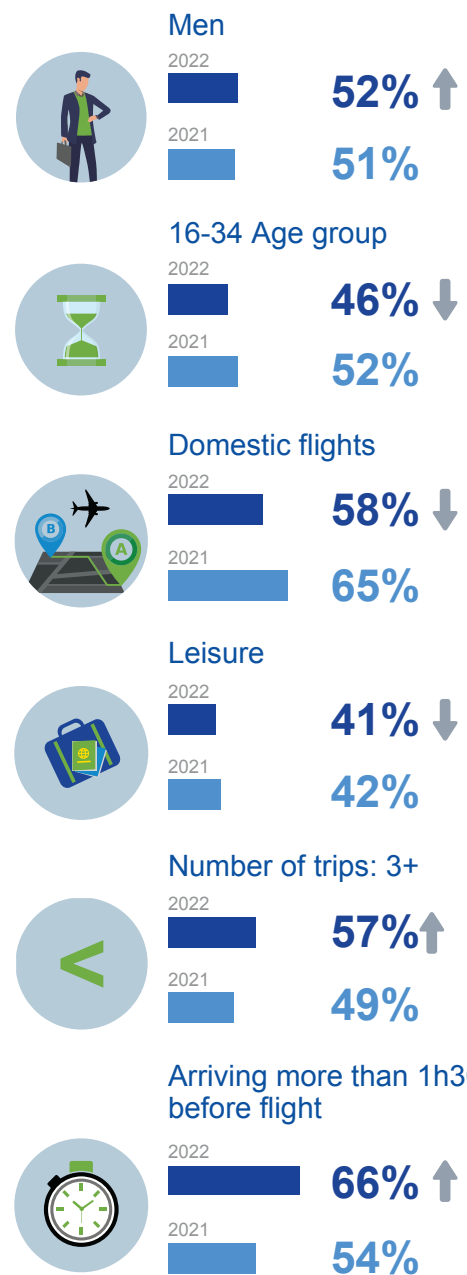
While technology can support some of the current gaps in the journey, the employees will always play a key role in the passengers' experience. The pandemic has disrupted many employees' core values and it will be important to gain a better understanding of their goals and objectives to help improve their overall workplace experience and support recruitment and retention.

Travel habits in 2022?

The proportion of passengers who travelled for leisure has remained relatively stable in the past two years. Domestic travel has remained the most important destination, but with the ease or removal of travel restrictions, international destinations have increased in popularity. Also, according to ASQ data, passengers have travelled more often in 2022 compared to 2021. This result is in line with the trends from the *ASQ 2022 Global Traveller Survey* showing that travellers were not only planning to travel again in the year to come, but they were also planning to travel as much, or even more than before the pandemic.

PASSENGERS' PROFILE

Who travelled in 2022, where and why?



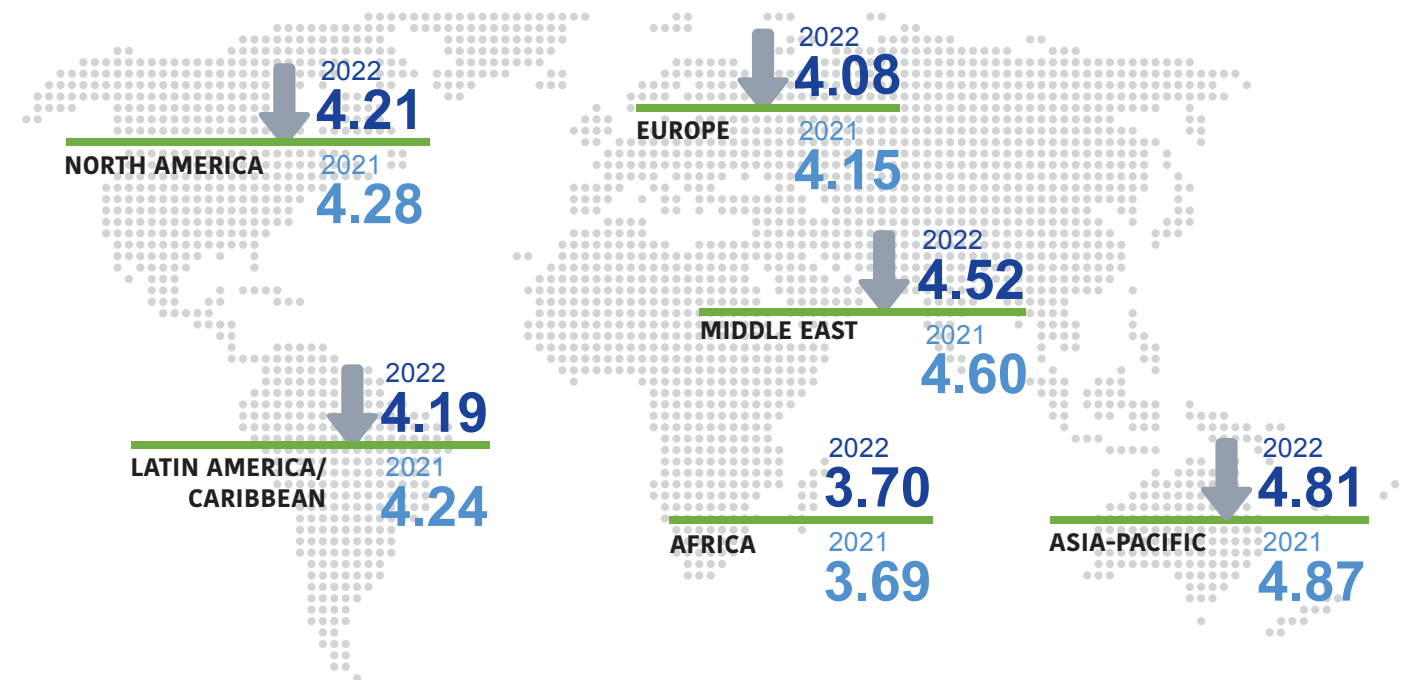
% represented by this segment of passengers

↑ ↓ indicates that the proportion represented by this segment is higher compared to the 2021 result at a statistically significant level (95%).



Overall satisfaction BY REGION

The rapid traffic recovery observed since March 2022 imposed a sudden and enormous strain on the industry in all regions. The overall satisfaction of the passengers' journey has been negatively impacted in most regions, but slightly more in the Middle East. The overall satisfaction in Africa remained at parity compared to the previous year.



Overall satisfaction BY AIRPORT SIZE

Most airport size categories have received lower ratings for their overall satisfaction score in 2022 compared to 2021. Interestingly, only the largest airports (>40 mppa) have recorded an increase in their score. Some of them might be more advanced in terms of technological solutions which may have compensated for the shortage of staff.

Airport Size	2021	2022
< 2M	4.28	4.23 ↓
2-5M	4.51	4.38 ↓
5-15M	4.34	4.29 ↓
15-25M	4.45	4.37 ↓
25-40M	4.29	4.19 ↓
>40M	4.43	4.46 ↑

Results are means on a 5-point scale.

↑ ↓ indicates that the segment's performance is higher or lower compared to the 2021 result on a statistically significant level (95%).

Satisfaction BY CATEGORY



Results are means on a 5-point scale.

Source: ACI Airport Service Quality Departures – Main type Programme 2021-2022, based on Q1 to Q4 2022 results with 291 airports. Data for 2021 has not been weighted according to traffic type while Data for 2022 has been weighted