IATA Global Passenger Survey

2019 Highlights





60%

Not disclosed 2%





Our vision relies on a happy passenger

% OF SATISFIED PASSENGERS

General satisfaction (scores 7-10)* 75% 75%

Highest satisfaction

(scores 8-10)*

2017

52%

74%

2018

49%

52%

2019

...

2037

* On a scale 1-10, where 1 - completely dissatisfied, 10 - completely satisfied



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PASSENGER SATISFACTION

DISSATISFIED 2018





SATISFIED 2018

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PASSENGER SATISFACTION

Regional outlook

Top concerns: Security IFE Border control/Immigration Baggage collection

Europe: 76%

North America: 73%

Latin America: 73%

Africa: 67%

North Asia: 81%

Middle East: 71%





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enable innovation

facilitate seamless journey

improve disruption management

PASSENGER PRIORITIES

streamline baggage handling

process

address the needs of **passengers** with disabilities



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SMART CHECK-IN



51%

vs 47% in 2018

On-line via my smart phone/ device continues to rise as the most preferred way to check in





27%

would pay for last-minute purchases such as additional bag, upgrade or lounge access **with an airline app**

AIRLINE APP KEEPS RISING

innovation

Preferred options for receiving notifications:





BIOMETRICS

innovation

46%

vs 45% in 2018

Biometric identification replacing favored passport as my **travel document**



READY FOR A CHANGE



innovation

Biometrics supporter profile

Frequent flyer +10 trips / year

Male

35-44 years old

Experienced travel disruption

Willing to share personal information



THUMBS UP FOR IMMIGRATION E-GATES



61% Intuitive

50% Enhance security

72% Satisfied with an overall experience



innovation

seamless journey





seamless journey

60% Efficient queuing process at the boarding gate
51% Not needing a coach/ bus to get to the aircraft
46% Availability of overhead space for on-board hand luggage (vs 42% in 2018)

WHEN BOARDING...

... I want efficiency and comfort

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seamless journey



AT THE TRANSFER AIRPORT



Not having to go through **immigration again** Africa R O O M T

Receiving notifications on a smart device that my bag has successfully **transferred**

WHEN FLYING WITH MULTIPLE CARRIERS

passengers

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4_{out of 5}

I knew which airline to **check-in** with

l clearly understood which airline is operating the various flights seamless journey

...WHILÉ

seamless journey

I received **boarding passes** for all my flights at my initial check-in



passengers

I knew which airline to **contact** if I had an issue during the journey



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baggage handling

Bag collection identified as a main **point of attention** for the industry

BAG

HANDLING



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baggage handling

IF I COULD TRACK MY BAG...

46%

would want their bag delivered directly to the final destination

Of the remaining 54% **1 out of 2** would still travel with cabin baggage



WHY DON'T YOU CHECK-IN YOUR BAG?

52%

I don't want to wait for my bag at arrival



baggage handling



23% I am afraid of a loss



disruption management

55%

experienced a travel disruption in the past 12 months

DISRUPTION MANAGEMENT



disruption management

HOW CAN WE IMPROVE?

55%

vs 54% in 2018

Real time & accurate travel information

Flight status Bag information

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53%

vs 47% in 2018

Automatic flight re-booking





Tell us more: PASSENGERS WITH DISABILITIES

Prefer an agent to drop off their baggage for them

When their travel is disrupted, they want to have baggage tracking information available

Prefer to check-in at the airport

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Having wi-fi on-board is important



Less willing to replace passport with biometrics

Less willing to share personal information

Access to essentials during the flight and additional fees are the main reasons for not checking in a bag

> Prefer to have baggage delivered to their final destination, provided that they can track it

Tell us more: FEMALE

When the trip starts, being notified about time to the gate and baggage status is important



Prefer to pay with a wallet on their smart device

Enjoy collecting passport / visa stamps

Do not check-in their baggage because needs essentials during flight

Tell us more: MILLENIALS

Having Wi-fi on board is important

> Pre-travel: want to be notified about regulations and requirements (e.g. visa requirements, health advisories)

> > THE THE PARTY







2019 Global Passenger Survey

Passenger Satisfaction

Benchmark





iata.org/airsat

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THANK YOU

