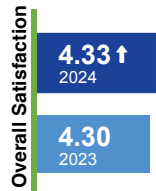


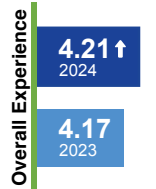


Overall scores **WORLDWIDE**

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



The **Overall Satisfaction** helps determine how well airports are servicing their passengers.

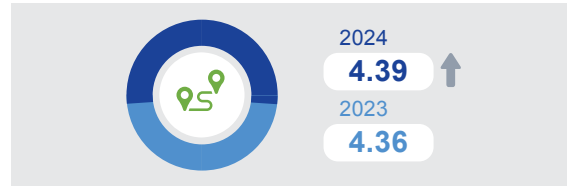


The **Overall Experience** focuses on the impression that is left by the journey at the airport.

In 2024, the airport industry fully recovered to pre-pandemic traffic levels, surpassing them in some countries. While airport experiences and operations were significantly impacted during the pandemic due to various health crisis management factors, these challenges were effectively addressed. Airports not only returned to a more 'normal' state but also refocused on enhancing the overall passenger experience, as reflected in the 2024 ASQ annual results.

According to the **ACI ASQ 2024 Global Traveller Survey**, today's passengers expect a seamless, convenient, and enjoyable experience, with a strong emphasis on sustainability. Well-being has also become a priority for consumers and airports must adapt their experiences to support passengers' physical, mental, and emotional health. Significant investments are being made in technology to create a seamless experience, enhance passengers'

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well-being, and reduce stress and anxiety. These investments not only create new possibilities through technology but also boost the reliability and user-friendliness of these solutions, resulting in a clear improvement in the overall ease of travel.

When designing solutions to enhance the traveller's journey, successful airports ensure they understand the diverse traveller profiles they may encounter. Using passenger personas is a powerful tool to identify key traits, behaviors, goals, and needs of specific customer types, enabling the personalization of solutions that address their expectations. The Easygoing Enthusiast, the largest segment in the **ASQ Passenger Personas**, represents 37% of global travellers. This group consists mainly of younger travellers from Generation Z and Millennials, who are positive and open to using technology to enhance their journey. While they require clear proof of the benefits, they are also willing to share personal information in exchange for a more tailored experience.

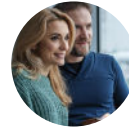
Finally, ASQ scores highlight that commercial areas remain an area of opportunity for improving the overall airport experience. While passengers are eager for a more enjoyable experience during this part of their journey, many express dissatisfaction with the current offerings and perceived value, especially given the high inflation rates.

BY ASQ PERSONA

The Easygoing Enthusiast **37%**



The Destination Driven **29%**



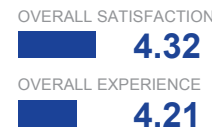
The Optimistic Colleague **16%**



The Experienced Professional **9%**



The Devoted Parent **9%**

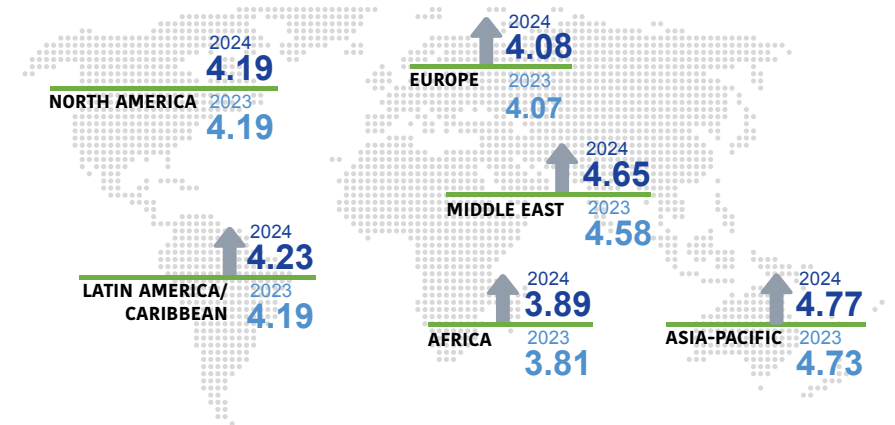


% represent the size of each segment
Overall Satisfaction and Experience are means on a 5-point scale



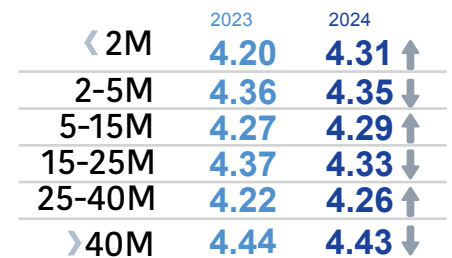
Overall satisfaction **BY REGION**

Overall satisfaction has shown a positive trend across all regions, with Africa and the Middle East seeing the most significant increases. Except for North America, which remained stable, all other regions have surpassed the satisfaction levels recorded in the 2023 Barometer. This reflects a notable improvement in traveller experience globally, highlighting the positive strides made in airport services and overall travel satisfaction in recent years.



Overall satisfaction **BY AIRPORT SIZE**

There is no clear trend in satisfaction based on airport size. However, satisfaction has increased in three categories (< 2M, 5-15 M, 25-40 M), with the most notable improvement in the shopping and dining areas, despite it still receiving the lowest score. Conversely, satisfaction has decreased in three categories (2-5 M, 15-25 M, >40 M), primarily driven by the airport atmosphere.



Results are means on a 5-point scale.

↑↓ indicates that the segment's performance is higher or lower compared to the 2023 result on a statistically significant level (95%).



Satisfaction **BY CATEGORY**



Results are means on a 5-point scale.

↑↓ indicates that the proportion represented by this segment is higher compared to the 2023 result at a statistically significant level (95%).
Source: ACI Airport Service Quality Departures – Main type Programme 2023-2024, based on Q1 to Q4 2024 results with 367 airports.