High satisfaction scores for 2 years in a row

% of Satisfied (Very satisfied + Somewhat satisfied)

- 74% in 2017
- 75% in 2018
- 75% in 2019
- 82% in 2021 (last 24 months)
- 80% in 2022

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Across the travel journey, top satisfaction levels for:

<table>
<thead>
<tr>
<th>Stage</th>
<th>2022 Satisfaction</th>
<th>2021 Satisfaction</th>
<th>2022 Dissatisfaction</th>
<th>2021 Dissatisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking</td>
<td>84%</td>
<td>81%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Searching for Travel Options</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arriving at airport</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check-in</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Baggage drop</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Security</td>
<td>75%</td>
<td>71%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Boarding</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onboard</td>
<td>77%</td>
<td>73%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Transfer</td>
<td>68%</td>
<td>64%</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Border control / Immigration</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Baggage collection</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reaching final destination</td>
<td>81%</td>
<td>81%</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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3 stress areas: transfer, immigration and baggage

- Booking: 84% satisfaction, 5% dissatisfaction
- Searching for Travel Options: 81% satisfaction, 7% dissatisfaction
- Arriving at airport: 79% satisfaction, 7% dissatisfaction
- Check-in: 80% satisfaction, 8% dissatisfaction
- Baggage drop: 75% satisfaction, 7% dissatisfaction
- Security: 71% satisfaction, 9% dissatisfaction
- Boarding: 77% satisfaction, 10% dissatisfaction
- Onboard: 73% satisfaction, 13% dissatisfaction
- Transfer: 68% satisfaction, 12% dissatisfaction
- Border control / Immigration: 64% satisfaction, 12% dissatisfaction
- Baggage collection: 69% satisfaction, 5% dissatisfaction
- Reaching final destination: 81% satisfaction, 7% dissatisfaction

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Convenience is a key enabler for all touchpoints

- **PLANNING & BOOKING**: “It would be so easy access all my trip information from one single location”
- **TRAVEL FACILITATION**: “I am willing to share my information in advance and have contactless travel”
- **AIRPORT PROCESS**: “I wish there could be alternatives to checking-in baggage”

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Proximity is #1 reason for choosing departure location

Top 3 reasons for selecting your departure airport:

- Proximity: 75%
- Ticket Price: 39%
- Airline Availability: 34%
Convenience is a key satisfaction driver when travel planning

82% passengers are satisfied when able to pick their preferred payment method

Clear improvement areas:

- Access to information in one single place
- Clarity & transparency on the offer content
- Ease of seat selection
Need to raise awareness on CO2 offsetting

More than **80%** of passengers **don't offset their flight carbon emission**

- **30%** are not aware of such an option
- **24%** don’t want to
- **18%** don’t have the option
Immigration requirements discourage travel

2 out of 5
have been discouraged from traveling
due to immigration requirements

65%
main deterrent is process complexity
Technology simplifies travel and drives convenience

**ONLINE VISA**

66% agree online application before travelling is the best way for obtaining a visa

**DATA SHARING**

83% willing to share immigration data (e.g. passport, visa, health questionnaire, etc.) to expedite airport process

**BIOMETRICS**

1 in 3 have already used biometrics in the travel journey
Biometrics in travel is here to stay

88%
Passengers are satisfied with overall biometric process

75%
passengers would be eager to use biometrics instead of passports or boarding passes
Boost biometrics usage with better data protection

Top concerns with using biometric information

- **56%** loss of data due to data breaches
- **52%** lack of knowledge of who the passenger data is being shared with
- **51%** not knowing how passenger data is being handled or stored
Preference to complete certain processes off-airport

Top process to be completed before arrival at the airport

- Check-in: 44
- Immigration Procedures: 33
- Baggage Check-in: 32
Passengers would like to get through the airport as quickly as possible

### Overall time spent at the airport

<table>
<thead>
<tr>
<th>Time Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 30 min</td>
<td>5</td>
</tr>
<tr>
<td>30 min to 1h</td>
<td>21</td>
</tr>
<tr>
<td>1h to 2h</td>
<td>42</td>
</tr>
<tr>
<td>2h to 3h</td>
<td>25</td>
</tr>
<tr>
<td>&gt; 3h</td>
<td>7</td>
</tr>
</tbody>
</table>

### Ideal time spent at the airport

- **Less than 30min**: When travelling with a carry-on bag only
- **Less than 45min**: When travelling with a carry-on & check-in bags
- **Less than 1h**: When travelling with mobility aid or other assistance
Queuing is a top improvement area

#1 improvement area for

Examples of improvement:

- **Security**: 93% interested in a trusted program to expedite security screening
- **Boarding**: 25% would appreciate not queuing on the jet bridge
- **Border Controls**: 20% interested in automated solution to speed up control process

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Baggage handling remains an issue

2 in 5 have had their bags mishandled

1 in 5 expressed dissatisfaction on the service provided
Tracking could encourage passengers to check-in bags

29% have flown with an airline that shared baggage information

81% (+8pp vs. 2021) are more likely to check-in bags if it can be tracked at all times

51% would be interested in a baggage information service

50% have used and would be interested in using an electronic bag
Need for alternative options to check-in baggage

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>The airlines would transfer your bags from home to your final destination</td>
<td>67%</td>
<td>65%</td>
</tr>
<tr>
<td>Check-in a baggage at location near you</td>
<td>73%</td>
<td>68%</td>
</tr>
<tr>
<td>Baggage on a separate flight than you</td>
<td>46%</td>
<td>39%</td>
</tr>
</tbody>
</table>
More room for improvement in transfer experience

Only 68% satisfaction transfer at the Airport in 2022

Redundancy of processes negatively impacting satisfaction

Top 3 improvement areas for connecting flights

- Not having to pick up and re-check my bag
- Not having to go through security screening
- Not having to go through immigration
What are the solutions?
Modern Airline Retailing
Using Digital Identity technologies to transform the customer experience with:

- **Contactless** travel through biometric enabled identification
- Digitalization of admissibility in advance of travel

Arrive at the airport **Ready to Fly**
Thank you!