IATA Global Passenger Survey

2023 Highlights

Nick Careen
SVP, Airport, Passenger, Cargo, Security
Question asked: Overall, how satisfied are you with your air travel experience in the past 12 months? Please take all aspects of your journeys into account (e.g., booking, security, boarding, flight, baggage collection, etc.)?
Air travelers’ pain points remain about the airport processes ("baggage", "border control" and "security").

Source: Global Passenger Survey 2023
Base: N (2022)=10'206, N (2023)=8'790

2023 Satisfied
2022 Satisfied
2023 Dissatisfied
2022 Dissatisfied

Booking 84%
Search for Travel Opt 82%
Airport Arrival 83%
Check-In 82%

Baggage Drop 75%
Security 73%

Boarding 77%
On-Board 76%

Transfer 71%
Immigration 69%
Baggage Collection 68%
Final Dest Reach 83%

8% 14%
9% 8%
9% 8%
11% 5%
5% 6%
6% 5%
8% 9%
5% 6%
6% 5%

Source: Global Passenger Survey 2023
Base: N (2022)=10'206, N (2023)=8'790
Passengers’ top priorities are:

**CONVENIENCE**
“It would be so easy if I could access all my trip information in one single location”

**SPEED**
“Too much time spent at border control”
Convenience is the driver for positive booking…

84% travelers are satisfied with their booking experience

#1 touchpoint with the highest satisfaction levels

Improvement areas:
- Access to information in one single place
- Clarify what is included in the price and what is optional
... and payment experiences

3 out 4 travelers are satisfied with the ticket payment experience

73% have preferred paying with credit/debit card

But preferred payment medium vary by region

<table>
<thead>
<tr>
<th></th>
<th>Global</th>
<th>Africa</th>
<th>Asia Pacific</th>
<th>Europe</th>
<th>LATAM</th>
<th>Middle East</th>
<th>North America</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debit/Credit Card</td>
<td>73%</td>
<td>53%</td>
<td>61%</td>
<td>81%</td>
<td>85%</td>
<td>70%</td>
<td>74%</td>
</tr>
<tr>
<td>Digital Wallet</td>
<td>18%</td>
<td>11%</td>
<td>41%</td>
<td>15%</td>
<td>4%</td>
<td>14%</td>
<td>8%</td>
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<tr>
<td>Bank Transfer</td>
<td>18%</td>
<td>30%</td>
<td>16%</td>
<td>17%</td>
<td>17%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Loyalty Points</td>
<td>17%</td>
<td>11%</td>
<td>11%</td>
<td>14%</td>
<td>20%</td>
<td>18%</td>
<td>25%</td>
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Ranking of preferred method of payment. Question with multiple choices.

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Proximity is #1 reason for choosing departure location

Top 3 reasons for selecting your departure airport:

- Proximity: 71%
- Ticket Price: 31%
- Airline Availability: 25%
Complex visa requirements deter travelers

36% have been discouraged from traveling due to immigration requirements

49% main deterrent is process complexity
When data sharing is a key enabler for convenient immigration process

87% are willing to share immigration info before departure to speed up arrival process, up 4% from 2022

2 out 3 prefer online application ahead of travelling for obtaining a visa

H6. What are your biggest concerns with regards to the use of your biometric information?

*Multiple choice*

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<td>16.3%</td>
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<td>2.9%</td>
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Speed is of the essence at the Airport

55% passengers would like to be notified about FastTrack options ahead of their trip

2 out 3 believe that queuing times at security checkpoints need to be improved

91% said they would be interested in a trusted travel program to get them through security faster
Preference to complete certain processes off-airport

Top process to be completed before arrival at the airport

- Immigration Procedures: 45%
- Check-in: 33%
- Baggage Check-in: 19%
Increasing use of and confidence in Biometrics

+12pp
usage of biometrics at the airport in 2023. It represents 46% of the passengers

75%
of passengers want to use biometric data instead of passports and boarding passes

85%
score on positive satisfaction for those using biometrics
Data protection is the key enabler for biometrics

40% would reconsider the use of biometrics if they were reassured about its privacy

Top concerns about the use of biometric information
1. Data Breaches
2. Data being shared with other organization
3. Not knowing how long data will be stored
4. Not knowing how data can be deleted

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Improvements for baggage and related services, but still a pain point

2023 Dissatisfied touchpoint ranked by the largest %

Negative experience drivers

- Baggage Collection: 14%
- Border Control / Immigration
- Security
- Baggage Drop: 9%
- Boarding
- On-Board
- Transfer
- Check-In
- Search for Travel Opt
- Airport Arrival
- Booking
- Final Dest Reach

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