

Key Points from Passenger Survey

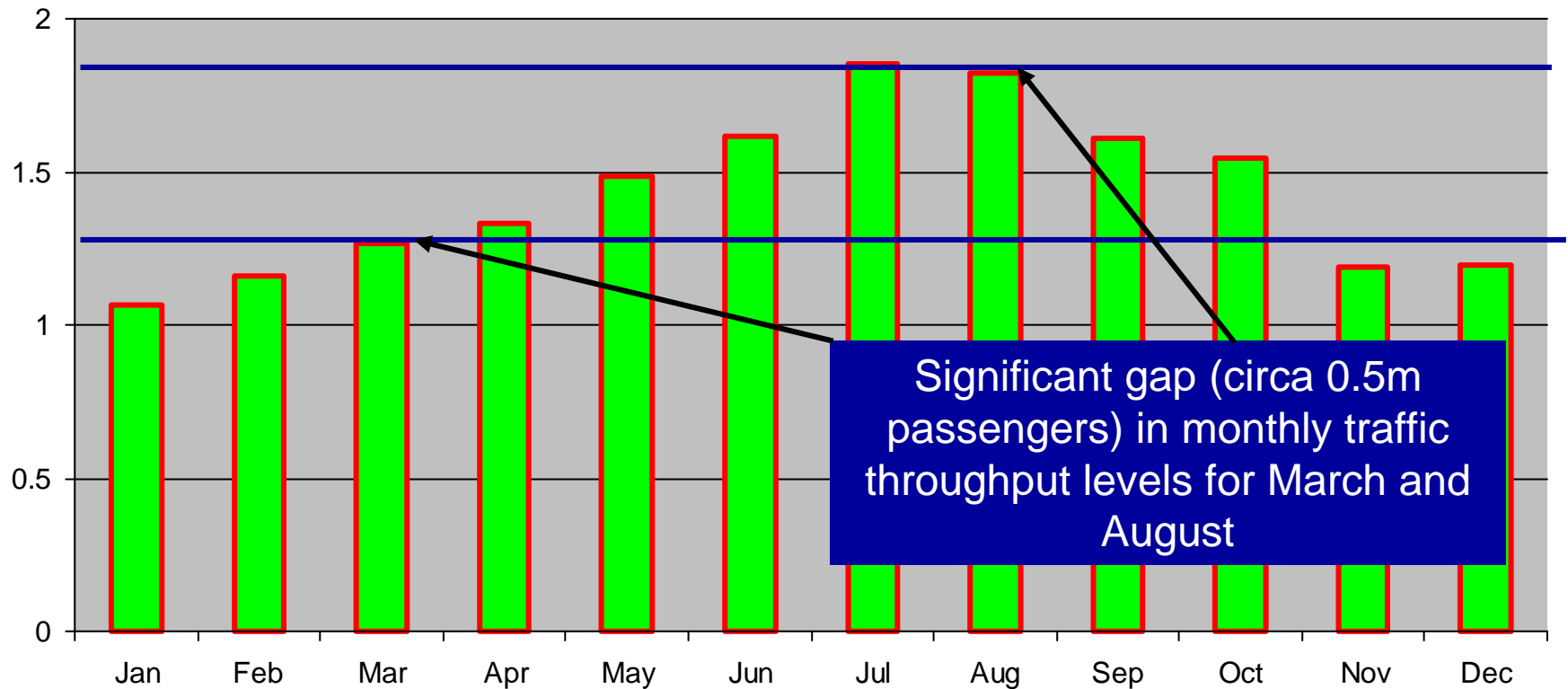


Timing of Survey



- ◆ The survey was undertaken in March 2005 and the passenger profile reflects this.
- ◆ March is an off peak time for traffic as can be seen from the attached graph which illustrates monthly traffic volumes for 2004
- ◆ Passenger satisfaction ratings would be expected to reduce significantly in the peak months due to congestion effects.
- ◆ As a result, DAA would like to repeat this survey in August 2005.

Monthly Passenger Traffic 2004



Services Most in Need of Improvement



- ◆ Check in desks
- ◆ Departures Gates/Lounges
- ◆ Catering/Retail facilities*
- ◆ Passenger Search Area
- ◆ Baggage Delivery facilities

*Important finding in the context of the ASA/ARC forecast of commercial revenues

Satisfaction with Queue/Transaction Times



- ◆ Between 24% and 38% feel that standard queue times before the passenger search machines and at check in desks are unsatisfactory:
 - Standard check in queue time for transatlantic flights should be 5 minutes shorter
 - Standard check in queue time for non-transatlantic flights should be 7 minutes shorter
 - Standard queue time before the passenger search machine should be reduced from 7 minutes to 4 minutes
- ◆ Typical waiting time for baggage delivery should be reduced by half - from 20 minutes to 11 minutes

Charges for Improvements

- ◆ A clear majority of passengers would find an increase of €3 per passenger acceptable (on the current maximum airport charge of €4.90), to achieve satisfactory levels of facilities and services.
- ◆ Almost three quarters of respondents would find an increase of up to €2 per passenger acceptable

Dublin Airport Services Facilities Research

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Introduction

Background

- Formally established in October 2004, the Dublin Airport Authority (DAA) is tasked with all aspects of the maintenance and development of standards and facilities at Dublin Airport.
- Following consultation between the DAA and the Commission For Aviation Regulation, it was decided to conduct a comprehensive survey of the views and opinions of passengers using Dublin Airport Facilities.
- TNS mrbi commissioned to conduct the study, with this report setting down its key findings.

Objectives

- The primary objectives of this survey can be identified as a need to gather valid and reliable information from representative samples of passengers using Dublin Airport regarding:
 - Levels of satisfaction with services provided at Dublin Airport.
 - Levels of acceptance of current standards for service delivery, with desired standards of service where they are deemed to be currently inadequate.
 - The degree to which the existing average cost to passengers of the provision of services is perceived to be appropriate or inappropriate.
 - The degree to which passengers are prepared to pay more for improved facilities, and how much more.

Methodology & Fieldwork

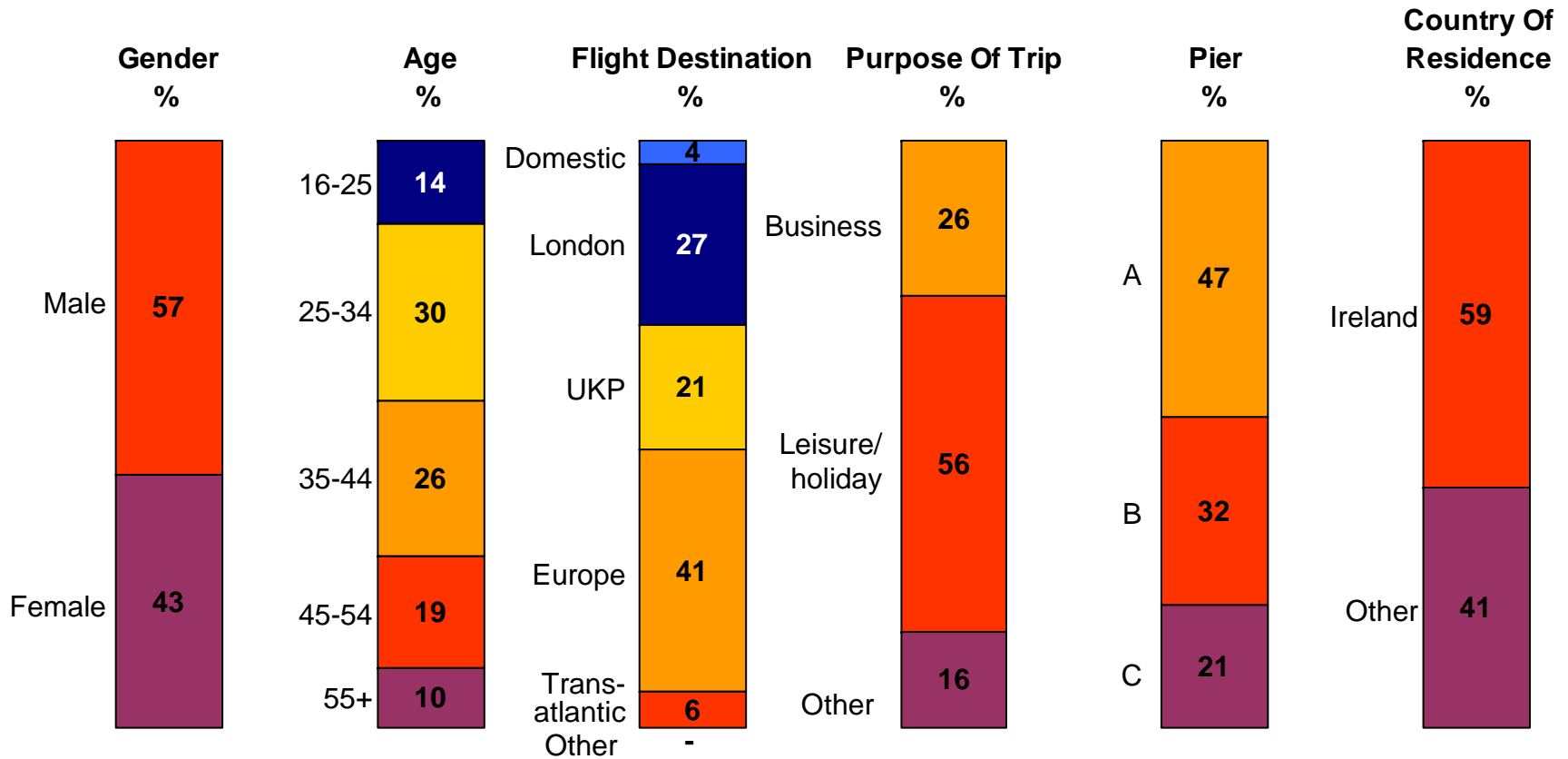
- Face to face interview via administration of structured questionnaire. Questionnaires piloted prior to fieldwork.
- Respondents approached for interview by using 'very next person' technique, with quotas applied for Departures (Pier A, B and C), and Arrivals.
- Dataset weighted back in line with known traffic volumes by Pier type, and route group.
- Fieldwork conducted Thursday March 10th – Sunday March 20th 2005, and spread across time of day and day of week.
- 456 respondents were interviewed in the Departures area and 152 in the Arrivals area.
- The statistical margins of error pertaining to a sample size of 456 is $\pm 4.75\%$, rising to $\pm 8.2\%$ for 152 interviews.

Summary Of Findings

Departures

Sample Profile

Base: All Departures



Facilities/Services Used From Time Of Arrival Into Dublin Airport

Base: All Respondents: 456

Outside the Terminal	%
Short term car park	9
Long term car park	15
Shuttle bus to Terminal from Long Term car park	14
Set-down area outside main building	58
<hr/>	
General	
Information desk	6
Flight information screens	94
Baggage trolleys	30
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Departures Area & Check-In	
Self-service kiosk (electronic check-in machine)	16
Check-in desk	84
Seating areas	48
Signposting to guide people around the Airport	81

Pier C travellers are more likely to use the long term car park (22%) than are those travelling through Pier A (14%) or B (13%).

Those aged 35-44 years significantly more likely to use SSK's (27%) than any other age group, as are business travellers (28%).



Q.1 Firstly, I would like to ask you about a number of facilities which you yourself may or may not have used from the time you arrived at Dublin Airport today. Looking at this list of facilities (**SHOW CARD A**), which of them have you availed of or used today?

Satisfaction With Experience Of Facilities/Services Used

Base: All Who Used Each Facility/Service

Extremely satisfied (7) → Extremely unsatisfied (1)

	Base	Mean Score	% Satisfied	% Dissatisfied
Outside The Terminal				
Short Term Car Park				
Ease of access to Short Term Car Park	48	5.31	79	8
Availability of spaces in Short Term Car Park	48	4.54	63	25
Walking distance to Terminal from Short Term Car Park	48	5.66	84	4
Long Term Car Park				
Ease of access to Long Term Car Park	61	5.49	89	7
Availability of spaces in Long Term Car Park	61	5.54	91	5
Shuttle bus service to Terminal from Long Term Car Park	56	5.37	87	11
Set-Down Area Outside Main Building				
Ease of access to Set-Down Area	257	5.33	86	8
Availability of space on the Departure Road	257	5.06	74	15

Generally high levels of satisfaction, with availability of spaces in the short term car park, and space on the departure road the main areas of contention.



Q.2 Which one of the words on this card (**SHOW CARD B**) would you use to describe your experience of (READ OUT FACILITY SERVICE FEATURE) today? Please note that it is the experience you have had today I am interested in, regardless of the type of experiences you may have had at other times in the past?

Satisfaction With Experience Of Facilities/Services Used

Base: All Who Used Each Facility/Service

Extremely satisfied (7) → Extremely unsatisfied (1)

	Base	Mean Score	% Satisfied	% Dissatisfied
General Inside The Terminal				
Information desk	27	5.30	76	18
Flight information screens	426	5.77	96	3
Number of baggage trolleys available for use	126	5.64	83	5

Just under one in five of the small number of passengers using the information desk are not satisfied with their experience.



Q.2 Which one of the words on this card (**SHOW CARD B**) would you use to describe your experience of (READ OUT FACILITY SERVICE FEATURE) today? Please note that it is the experience you have had today I am interested in, regardless of the type of experiences you may have had at other times in the past?

Satisfaction With Experience Of Facilities/Services Used

Base: All Who Used Each Facility/Service

Extremely satisfied (7) → Extremely unsatisfied (1)

	Base	Mean Score	% Satisfied	% Dissatisfied
Departures Area & Check In				
Self-Service Kiosks				
Number of SSK's available for use	52	5.87	86	10
Length of time to check in using the SSK	52	6.04	89	6
Length of time spent waiting to use the bag drop desk	52	5.71	70	3
Check-In Desk				
Number of check-in desks open & available	407	5.09	80	16
Length of time spent queuing before you reached the check-in desk	407	5.11	80	18
Having reached the check-in desk, length of time it took before your boarding card was given to you	407	5.82	96	3
Check-In Seating Area				
Amount of seats available	226	3.44	35	48
Cleanliness of seating area	226	5.34	74	8

Satisfaction levels amongst those using SSK's are high.

Those travelling to London and Europe are more likely to be dissatisfied with the number of check-in desks available (22% and 20% respectively).

Almost half of those using seating in the check-in area are unhappy with the amount of seats available.



Q.2 Which one of the words on this card (**SHOW CARD B**) would you use to describe your experience of (READ OUT FACILITY SERVICE FEATURE) today? Please note that it is the experience you have had today I am interested in, regardless of the type of experiences you may have had at other times in the past?

Satisfaction With Experience Of Facilities/Services Used

Base: All Respondents: 456

Extremely satisfied (7) → Extremely unsatisfied (1)

	Mean Score	% Satisfied	% Dissatisfied
Security Search Area			
Amount of space available in the queuing areas before Security Search	4.97	79	18
Amount of space available in the passenger search area itself	4.83	73	24
Length of time spent queuing before you reached the passenger search machine	5.23	87	10
Length of time spent moving through passenger search area having reached the search machine	5.37	90	8
Departure Gate/Lounge Area			
Walking distance from Security Search area to Departure Gate area	5.13	82	13
Amount of space available in the Departure Gate Area	4.91	75	18
Amount of seats available in the Departure Gate area	4.63	69	28

Again, high levels of satisfaction across the board. However, between one in five/one in four unhappy with the amount of space available in the Security Search and Departure Gate/Lounge areas, and with the amount of seats in the Departure gate area.



Q.2 Which one of the words on this card (**SHOW CARD B**) would you use to describe your experience of (READ OUT FACILITY SERVICE FEATURE) today? Please note that it is the experience you have had today I am interested in, regardless of the type of experiences you may have had at other times in the past?

Satisfaction With Experience Of Facilities/Services Used

Base: All Respondents: 456

Extremely satisfied (7) → Extremely unsatisfied (1)

	Mean Score	% Satisfied	% Dissatisfied
Signposting To Guide People Around Airport			
Amount of signposting	5.57	89	6
Ease of reading and understanding signposting	5.77	93	1



Q.2 Which one of the words on this card (**SHOW CARD B**) would you use to describe your experience of (READ OUT FACILITY SERVICE FEATURE) today? Please note that it is the experience you have had today I am interested in, regardless of the type of experiences you may have had at other times in the past?

Satisfaction With US Immigration Area (INS)

Base: All Transatlantic Passengers: 83

Extremely satisfied (7) → Extremely unsatisfied (1)

	Mean Score	% Satisfied	% Dissatisfied
US Immigration Area (INS)			
Amount of space available in the US Immigration (INS) area	5.1	47	12
Length of time spent queuing before you reached the US Immigration officials	5.31	53	8
Length of time it took the US Immigration officials to deal with you	5.6	59	4

The level of 'don't knows' registered amongst transatlantic passengers in relation to their satisfaction with INS services is quite high, at 34%, indicating that many are unsure what they should be comparing their experiences with.

Q.3 And how would you rate your experiences of (READ OUT FACILITY SERVICE FEATURE) at Dublin Airport today? - again using one of the words on this card....

Satisfaction With Standard Queue/Transaction Times

Base: All Respondents:456

Extremely satisfied (7) → Extremely unsatisfied (1)

	Standard Time	Mean Score	% Satisfied	% Dissatisfied
Spend queuing for transatlantic flights before reaching the check-in desk	20 mins	4.27	31	24
Spend queuing for non-transatlantic flights before reaching the check-in desk	15 mins	4.27	56	38
Spend queuing before reaching the Passenger Search machine	7 mins	4.71	73	24
Pass through the Passenger Search area	3 mins	5.19	86	9
Queue and be processed by US Immigration officials	20 mins	4.65	28	10

Between 24% and 38% feel that standard queue times before the Passenger Search Machine and at Check In desks are unsatisfactory.

Q.4 I would now like to turn to the length of time it takes a passenger traveling through Dublin Airport to pass through each of the different areas. For each of the different areas a departing passenger passes through, I am going to tell you what the typical time taken is. I would then like you to tell me how satisfactory or unsatisfactory you think this standard is using one of the words on this card. Firstly, the standard set for the time it takes a typical passenger to is..... How satisfactory or unsatisfactory do you think this is?

Average Queue/Transaction Times Perceived To Be Satisfactory

Base: All Respondents Unsatisfied With Standard Queue/Transaction Times

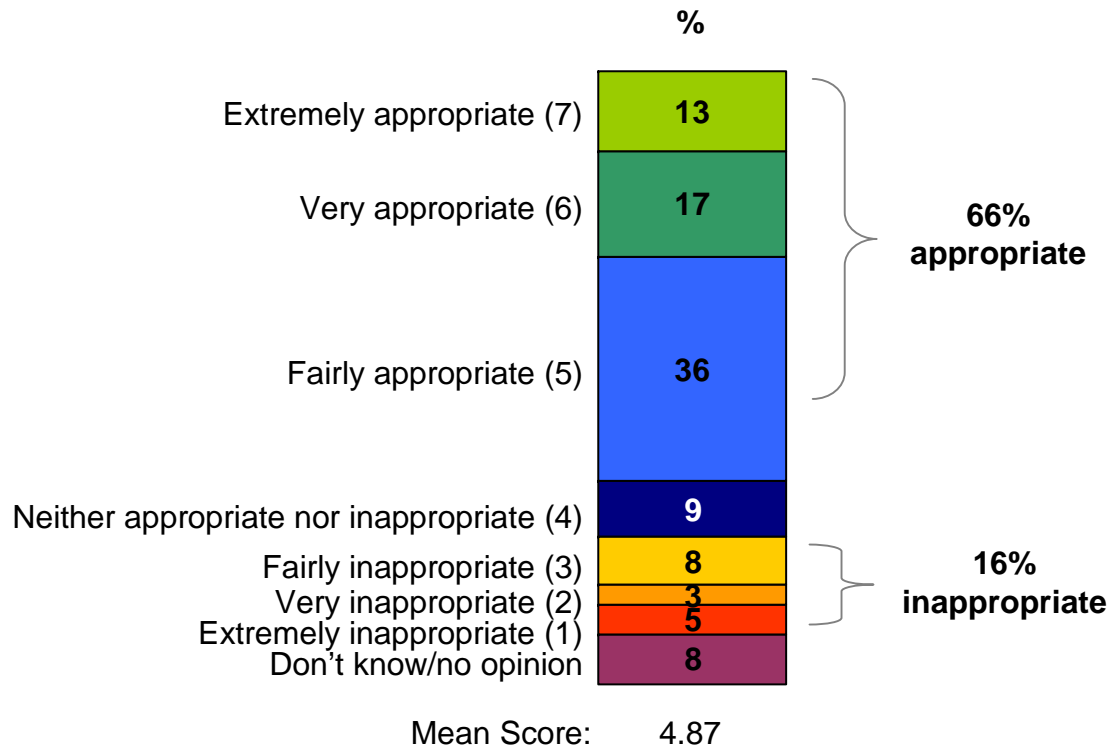
Area	Base	Average Time
Queue time for transatlantic flight before reaching the check-in desk	115	14.59
Queue time for non-transatlantic flight before reaching the check-in desk	162	8.09
Queue time before reaching the Passenger Search machine	111	4.05
Time spent passing through the Passenger Search area	41	2.07
Time taken to queue and be processed by US Immigration officials	48	12.75

...with these subsets of respondents feeling the standard check-in queue time for transatlantic flights should be 5 minutes shorter; for non transatlantic flights 7 minutes shorter, and a desire for the standard queue time before the Passenger Search Machine to be reduced from 7 minutes to 4 minutes.

Appropriateness Of €4.90 To Maintain & Develop Airport

Base: All Respondents: 456

Extremely appropriate (7) → Extremely inappropriate (1)



Two thirds of all departing passengers from Dublin Airport feel that €4.90 is an appropriate amount to pay for airport facilities, with one in six disagreeing.

Q.6 Dublin airport is only allowed to spend up to a maximum of €4.90 from each passenger ticket to maintain and develop the airport and provide services such as airfield and terminal buildings and providing airport security. This card will give you a good idea of what is covered by the €4.90.

How appropriate or inappropriate an amount do you think that €4.90 is for each passenger to pay towards the provision of these facilities, using one of the words on this card?

Services Which Need Improvement

Base: All Respondents: 456

	1 st Most Important %	2 nd Most Important %	3 rd Most Important %	Any Mention %
Short Term Car Parks	5	2	2	
Long Term Car Parks	2	2	3	
Roads, set down & pick up areas	8	4	4	
Departures concourse	2	2	3	
Check-In Desks	15	6	4	25
Passenger search area	8	9	5	22
Departure Gates/Lounges	12	11	8	31
Immigration Services area	*	2	1	
US Immigration area	2	1	1	
Airbridges	-	1	1	
Transfer buses from runway/tarmac to terminal building	*	1	1	

Q.7 Which one of these service areas do you feel is most in need of improvement at Dublin Airport? And after that, which one is most in need of improvement? **PROBE:** Are there any other areas you feel are in need of improvement at Dublin Airport?

Services Which Need Improvement

Base: All Respondents: 456

	1 st Most Important %	2 nd Most Important %	3 rd Most Important %	Any Mention %
Facilities for the disabled	1	2	3	
Catering/Retail facilities	14	17	13	44
Toilets	3	6	9	
Signposting	5	2	1	
Trolleys	1	1	1	
Baggage Delivery Facilities	7	9	8	24
Other facility (specify)	7	5	3	
Don't know/none	8	18	28	

44% of all departing passengers identify catering/retail facilities as the service area either most, second most, or third most in need of improvement.

Q.7 Which one of these service areas do you feel is most in need of improvement at Dublin Airport? And after that, which one is most in need of improvement? **PROBE:** Are there any other areas you feel are in need of improvement at Dublin Airport?

Reasonableness Of A Range Of Increases To Make Improvements

Base: All Who Suggested Improvements

→ Cumulative Analysis →

	€5.00 Increase (415) %	€4.00 Increase (415) %	€3.00 Increase (415) %	€2.00 Increase (415) %	€1.00 Increase (415) %
Extremely reasonable (7)	6	7	15	25	30
Very reasonable (6)	13	22	29	41	49
Fairly reasonable (5)	13	7	10	13	8
Neither reasonable nor unreasonable (4)	4	7	10	5	3
Fairly unreasonable (3)	11	18	14	3	1
Very unreasonable (2)	13	18	7	4	2
Extremely unreasonable (1)	34	16	11	6	5
Don't know	5	4	3	3	3
Mean Score	3.13	3.68	4.55	5.43	5.82

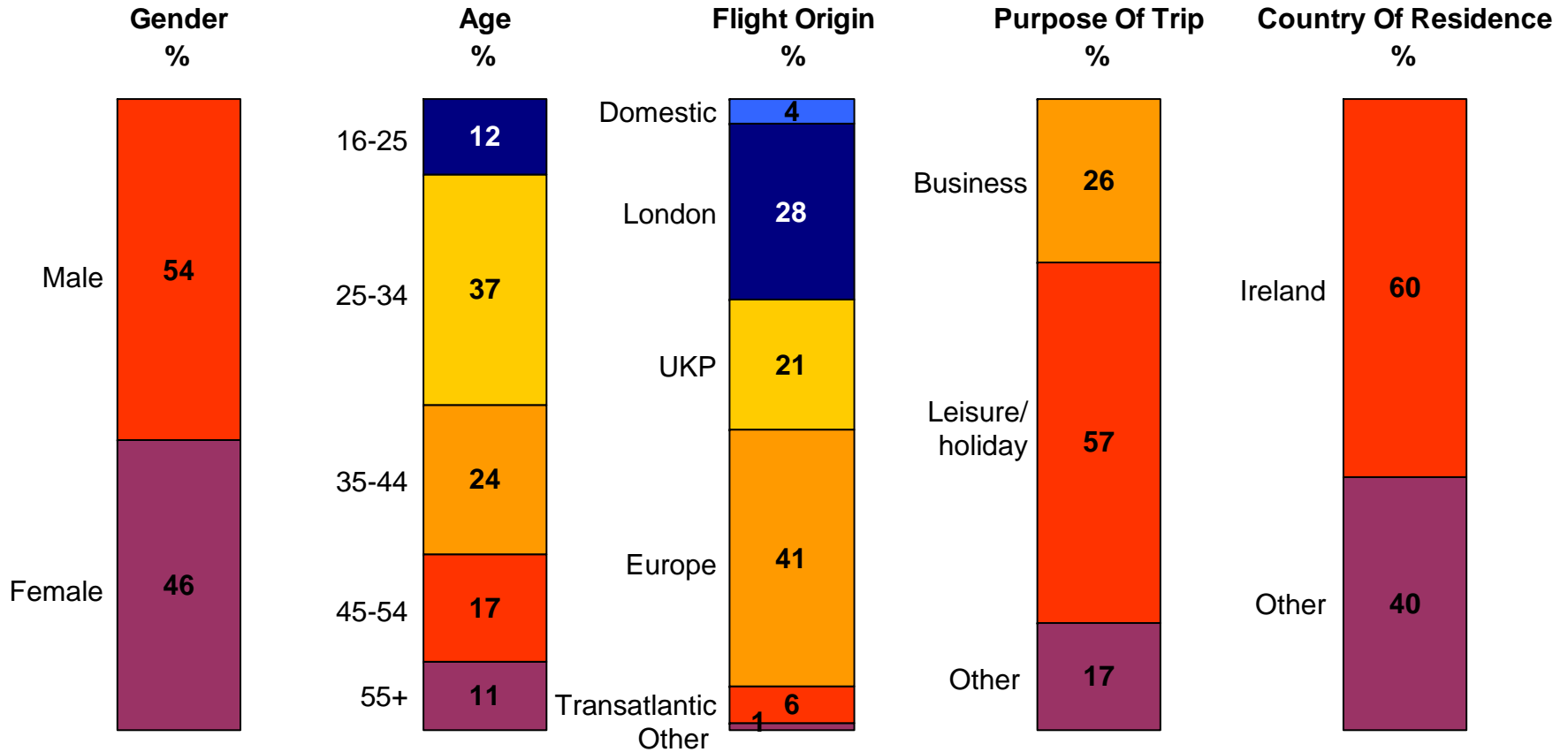
A small majority (54%) feel a €3 increase would be either extremely, very or fairly reasonable, a figure which rises to an overwhelming majority (79%) at a €2 increase.

Q.8 And if each of these three service areas was improved to a satisfactory level, how reasonable or unreasonable do you feel an increase of €5.00 on the maximum airport charge of €4.90 would be for each air ticket sold?

Arrivals

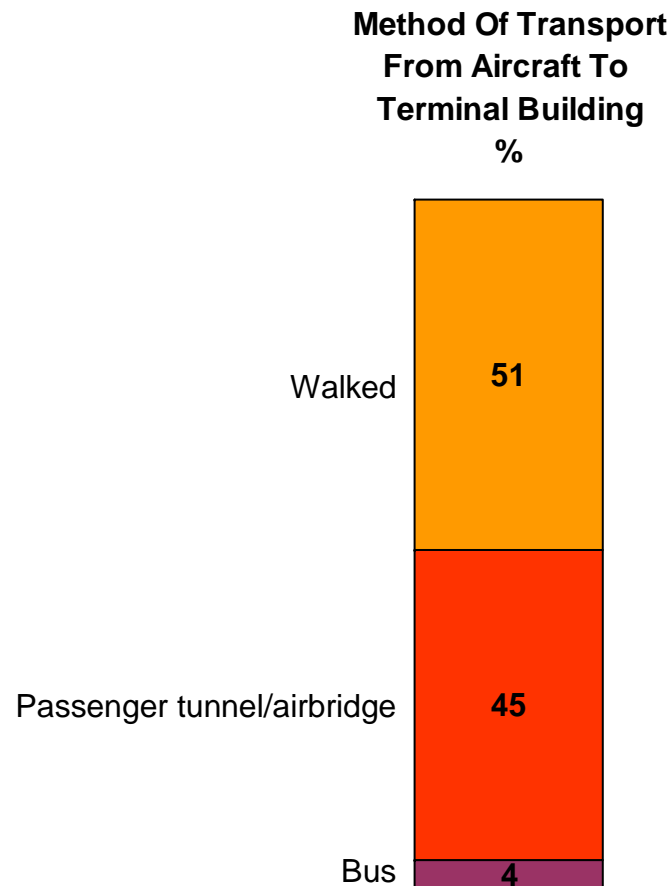
Sample Profile

Base: All Arrivals



Passenger Views Survey: Arrivals

Base: All Respondents: 152



A majority of Domestic, London and UKP arriving passengers walk from the aircraft to the terminal building, with a majority of European and Transatlantic/ other arrivals using the passenger tunnel/airbridge.

Q.1 How did you get from the aircraft to the Terminal Building today?

Satisfaction With Facilities/Services

Base: All Who Used Each Method

Extremely satisfied (7) → Extremely unsatisfied (1)

	Base	Mean Score	% Satisfied	% Dissatisfied
Walking distance from the aircraft to the terminal building	83	5.73	87	4
Length of time to get from the aircraft to the terminal building through the passenger tunnel/airbridge	60	5.69	94	-
Length of time to get from the aircraft to the terminal building using the transfer bus *	9	6.06	44	-

Very high levels of satisfaction with transfer from aircraft to terminal building.



Q.1(a) Which one of the words on this card (**SHOW CARD B**) would you use to describe your experience of (READ OUT FACILITY SERVICE FEATURE) today? Please note that it is the experience you have had today I am interested in, regardless of the type of experiences you may have had at other times in the past?

* Caution: note small base size

Satisfaction With Facilities/Services

Base: Total Sample: 152

Extremely satisfied (7) → Extremely unsatisfied (1)

	Mean Score	% Satisfied	% Dissatisfied
Immigration Services Area			
Amount of space available in the Immigration Services area	5.35	68	3
Length of time spent queuing before you reached the Immigration Services officials	5.60	68	3
Length of time it took the Immigration Services officials to deal with you	5.89	70	-
Baggage Claim Area			
Amount of space available in the baggage reclaim area	5.32	87	10
Length of time waiting to get your bag from the baggage carousel	5.08	75	10
Signposting To Guide People Around Airport			
Amount of signposting	5.33	84	9
Ease of reading & understanding signposting	5.51	86	3
Baggage Trolleys			
Number of baggage trolleys available for use	5.82	90	-

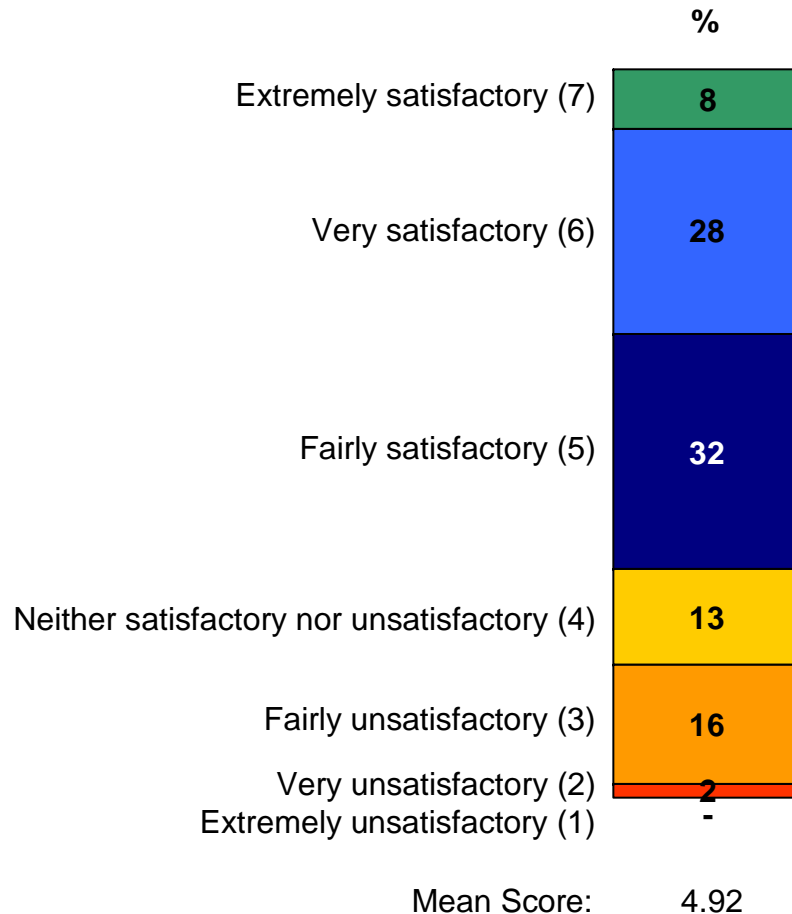
Again, very high levels of satisfaction overall, with one in ten arriving passengers unhappy with baggage reclaim procedures.



Q.1(a) Which one of the words on this card (**SHOW CARD B**) would you use to describe your experience of (READ OUT FACILITY SERVICE FEATURE) today? Please note that it is the experience you have had today I am interested in, regardless of the type of experiences you may have had at other times in the past?

Satisfaction With The Typical Time (20 minutes) From When Aircraft Parks To Bags On Carousel

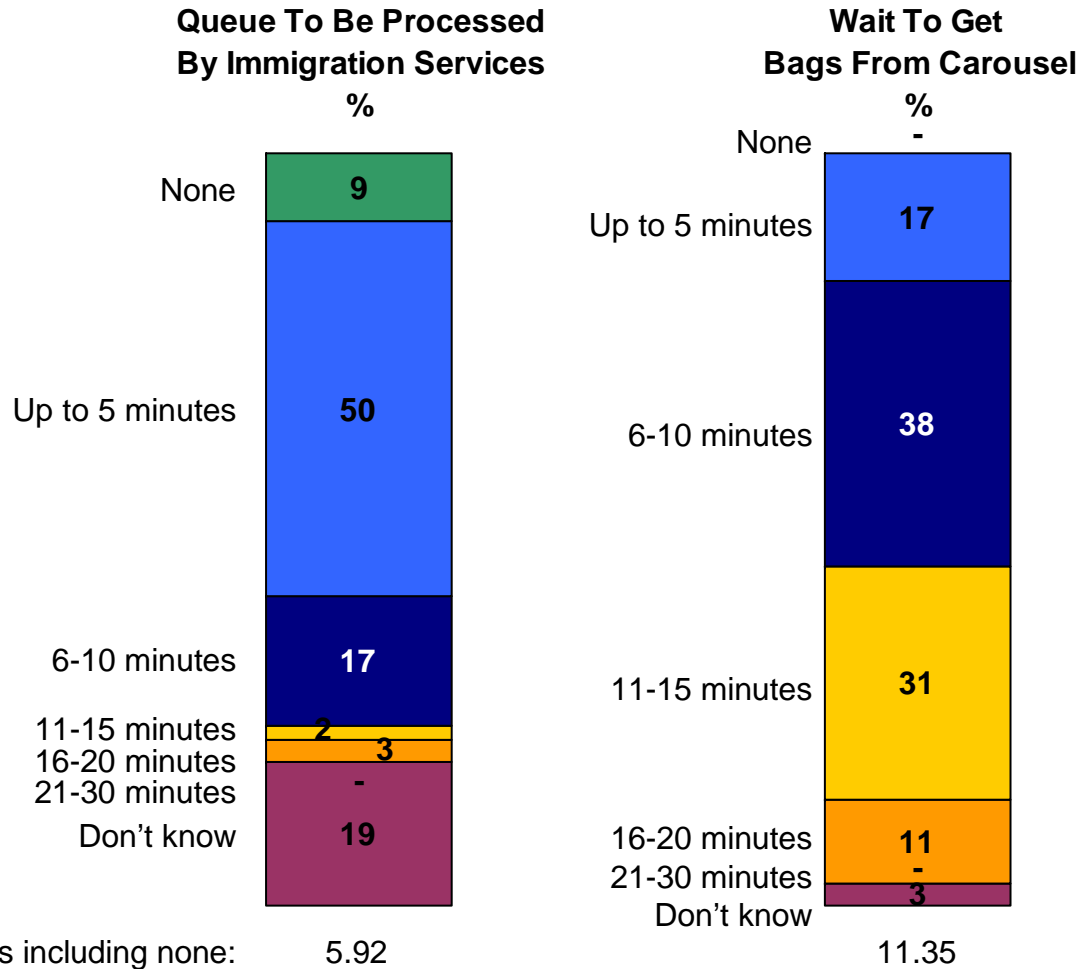
Base: All Respondents: 152



When told that the typical time taken from when the aircraft parks to when the bags arrive on the carousel is 20 minutes, the percentage of passengers dissatisfied rises to 18%.

Perceived Time Which Would Be Satisfactory

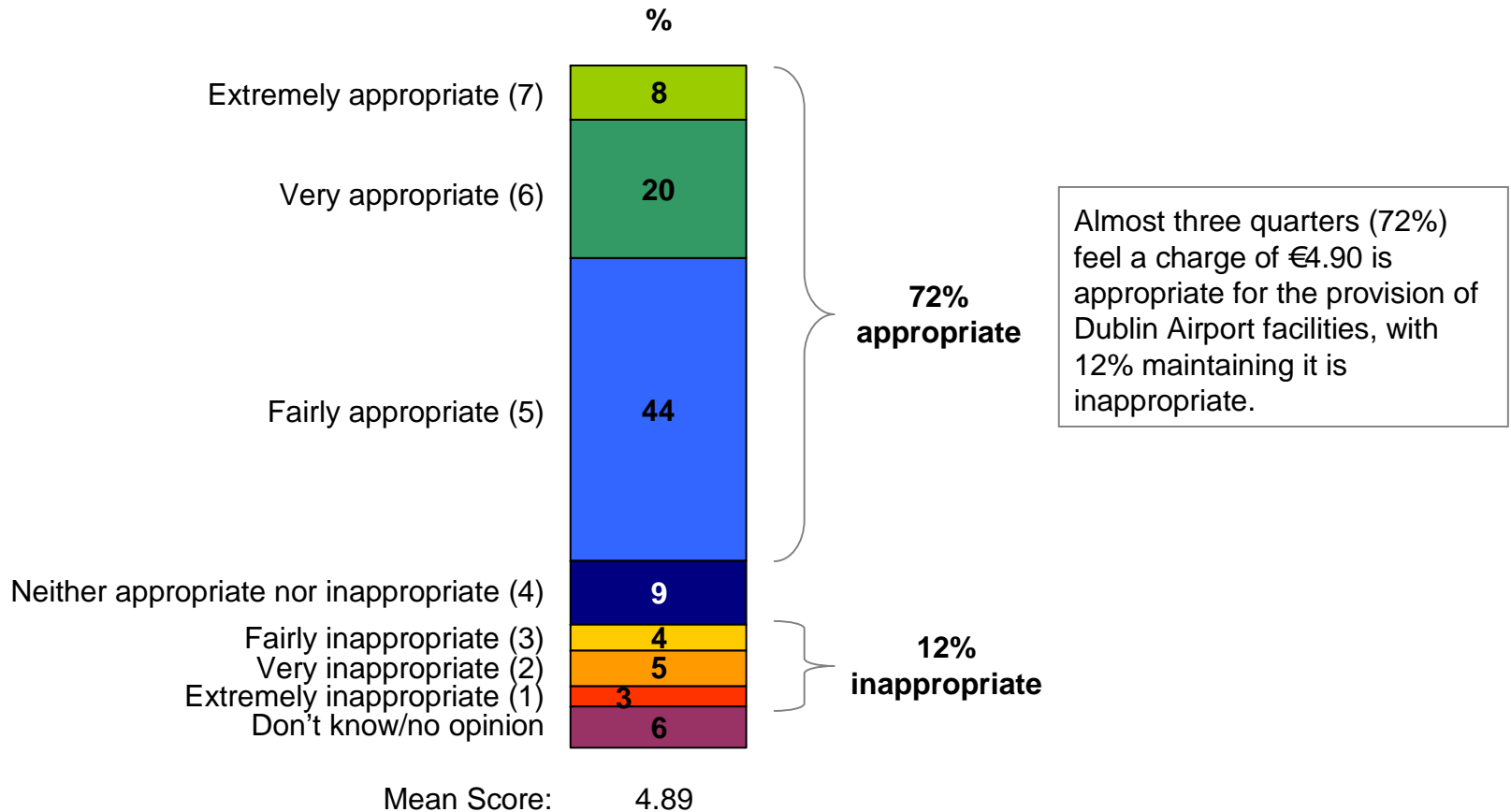
Base: All Respondents: 152



In effect, arriving passengers feel an average Immigration Services queue time of 6 minutes, and a waiting period of 11 minutes for baggage would be satisfactory.

Appropriateness Of €4.90 To Maintain & Develop Airport

Base: All Respondents: 152



Q.4 Dublin airport is only allowed to spend up to a maximum of €4.90 from each passenger ticket to maintain and develop the airport and provide services such as airfield and terminal buildings and providing airport security. This card will give you a good idea of what is covered by the €4.90.

How appropriate or inappropriate an amount do you think that €4.90 is for each passenger to pay towards the provision of these facilities, using one of the words on this card?

Services Which Need Improvement

Base: All Respondents: 152

	1 st Most Important %	2 nd Most Important %	3 rd Most Important %	Any Mention %
Short Term Car Parks	5	2	3	
Long Term Car Parks	2	3	-	
Roads, set down & pick up areas	6	3	2	
Departures concourse	1	1	3	
Check-In Desks	10	5	6	21
Passenger search area	3	2	3	
Departure Gates/Lounges	6	6	6	18
Immigration Services area	3	7	3	
US Immigration area	*	1	2	
Airbridges	*	-	-	
Transfer buses from runway/tarmac to terminal building	-	-	-	

Q.5 Which one of these service areas do you feel is most in need of improvement at Dublin Airport? And after that, which one is most in need of improvement? **PROBE:** Are there any other areas you feel are in need of improvement at Dublin Airport?

Services Which Need Improvement

Base: All Respondents: 152

	1 st Most Important %	2 nd Most Important %	3 rd Most Important %	Any Mention %
Facilities for the disabled	3	5	2	
Catering/Retail facilities	5	13	11	29
Toilets	4	6	3	
Signposting	4	2	4	
Trolleys	1	1	1	
Baggage Delivery Facilities	16	9	7	32
Other facility (specify)	3	1	2	
Don't know/none	27	35	44	

Key desired areas for improvement include Baggage Delivery facilities, Catering/ Retail facilities, Check In desks and Departure Gates/Lounges.

Q.5 Which one of these service areas do you feel is most in need of improvement at Dublin Airport? And after that, which one is most in need of improvement? **PROBE:** Are there any other areas you feel are in need of improvement at Dublin Airport?

Reasonableness Of A Range Of Increases To Make Improvements

Base: All Who Suggested Improvements

→ Cumulative Analysis →

	€5.00 Increase (116) %	€4.00 Increase (116) %	€3.00 Increase (116) %	€2.00 Increase (116) %	€1.00 Increase (116) %
Extremely reasonable (7)	11	13	17	25	30
Very reasonable (6)	10	15	31	44	52
Fairly reasonable (5)	12	13	11	5	2
Neither reasonable nor unreasonable (4)	7	14	7	10	4
Fairly unreasonable (3)	11	11	8	4	4
Very unreasonable (2)	16	16	11	6	4
Extremely unreasonable (1)	27	15	11	5	3
Don't know	5	3	3	3	3
Mean Score	3.37	3.94	4.67	5.40	5.74

Of those identifying three desired areas for improvement, 59% feel an increase of €3 for their desired improvements would be reasonable, rising to 74% at a €2 increase.

Q.6 And if each of these three service areas was improved to a satisfactory level, how reasonable or unreasonable do you feel an increase of €5.00 on the maximum airport charge of €4.90 would be for each air ticket sold?

Dublin Airport Services Facilities Research