



2026 Determination on Airport Charges

Passenger Advisory Group

January 2026

Daa agenda for the Passenger Advisory Group:

Ref	Section	Responsible
1	IAA Introduction	
2	Dublin Airport Quality Metrics - Overview of daa's approach to the 2026 Determination. - Current structure of objective and subjective SQM metrics.	Seán Murphy, daa
3	Dublin Airport Insights Overview - Overview of passenger profile and current insights. - High-level summary of current SQM methodology applied for subjective metrics.	Deirdre Roache, daa
4	Deep dive on selection of subjective metrics - Trend analysis of the passenger surveys from 2022 to present. - Consideration will be given to how the SQM framework looks at: Leisure, PRM and Business travellers. - Overview of actions and remedial changes applied since 2022 based on passenger surveys and feedback received. - Details of any amendments proposed to the subjective measures.	Ciara Clarke, RedC & Deirdre Roache, daa

Ref	Section	Responsible
5	Deep dive on selection of objective metrics: - Overview of objective metrics (security, assets and baggage, PRM). - Details of any proposed daa amendments to the objective metrics.	Seán Murphy, daa
6	Capital Investment Prog: - Proposed pier initiatives. - Proposed PRM improvements. - Benefits of proposed airbridges.	Simon McGreevy, daa
7	Conclusion Q&A and wrap of key messages.	Presenters / panel.

Dublin Airport: Ireland's Gateway to the World



36m+
PASSENGERS



190+
DESTINATIONS



EUROPEAN
GATEWAY TO
THE USA WITH
ALL-DAY U.S.
PRE-CLEARANCE

2,600 +
DEPARTING FLIGHTS P/W

45

AIRLINES
OPERATING
OUT OF DUBLIN AIRPORT



€9.6 BILLION

CONTRIBUTION IN GDP TO THE IRISH
ECONOMY

4th

BEST CONNECTED
EU AIRPORT TO
THE U.S

240+

FLIGHTS TO THE
U.S PER WEEK

+116K

JOBS SUPPORTED BY DUBLIN AIRPORT

45

Airline partners

4th

Most Connected for
Destinations to
North America

190+

Destinations

TOP 10

Worldwide Destinations:

- | | |
|----------------------|-------------------------------|
| 1. London - Heathrow | 6. Malaga |
| 2. Amsterdam | 7. Birmingham - UK |
| 3. Manchester | 8. Edinburgh |
| 4. London - Gatwick | 9. Barcelona |
| 5. London - Stansted | 10. Paris - Charles De Gaulle |

Dublin Airport Service Quality Metrics



The Regulatory Context

Economic Regulation for Dublin Airport

REGULATORY OVERSIGHT

Dublin Airport is regulated by the IAA

LEGISLATIVE CONTEXT

Aviation Regulation Act, The Airport Charges Directive, Air Navigation & Transport Act.

PRICE CONTROL

The IAA sets a price cap limiting the revenue per passenger that daa can collect through airport charges, this:

- Impacts financeability
- Capital Development enabler
- Determines Operating Expenditure
- Sets Service Quality Metrics

EARNINGS (EBITDA)

The price cap has direct impact to:

- Funding capital development
- Raising debt and maintaining strong investment grade.

COMPETITIVENESS

Influences how we compete with other airports.

INCENTIVES

Provides the motivation to run the airport efficiently and commercially.

Current Regulatory Model

Regulatory Control

Price Cap: Aeronautical Revenue

Aeronautical Revenue:

- Runway charges
- Passenger charges
- Aircraft Parking charges
- Airbridge charges

IAA sets a maximum average aero revenue per passenger net of discounts

Model

Single Till

All commercial revenue (non-aero) is used as a subsidy in the calculation of the aero price cap

Additional Regulatory Oversight

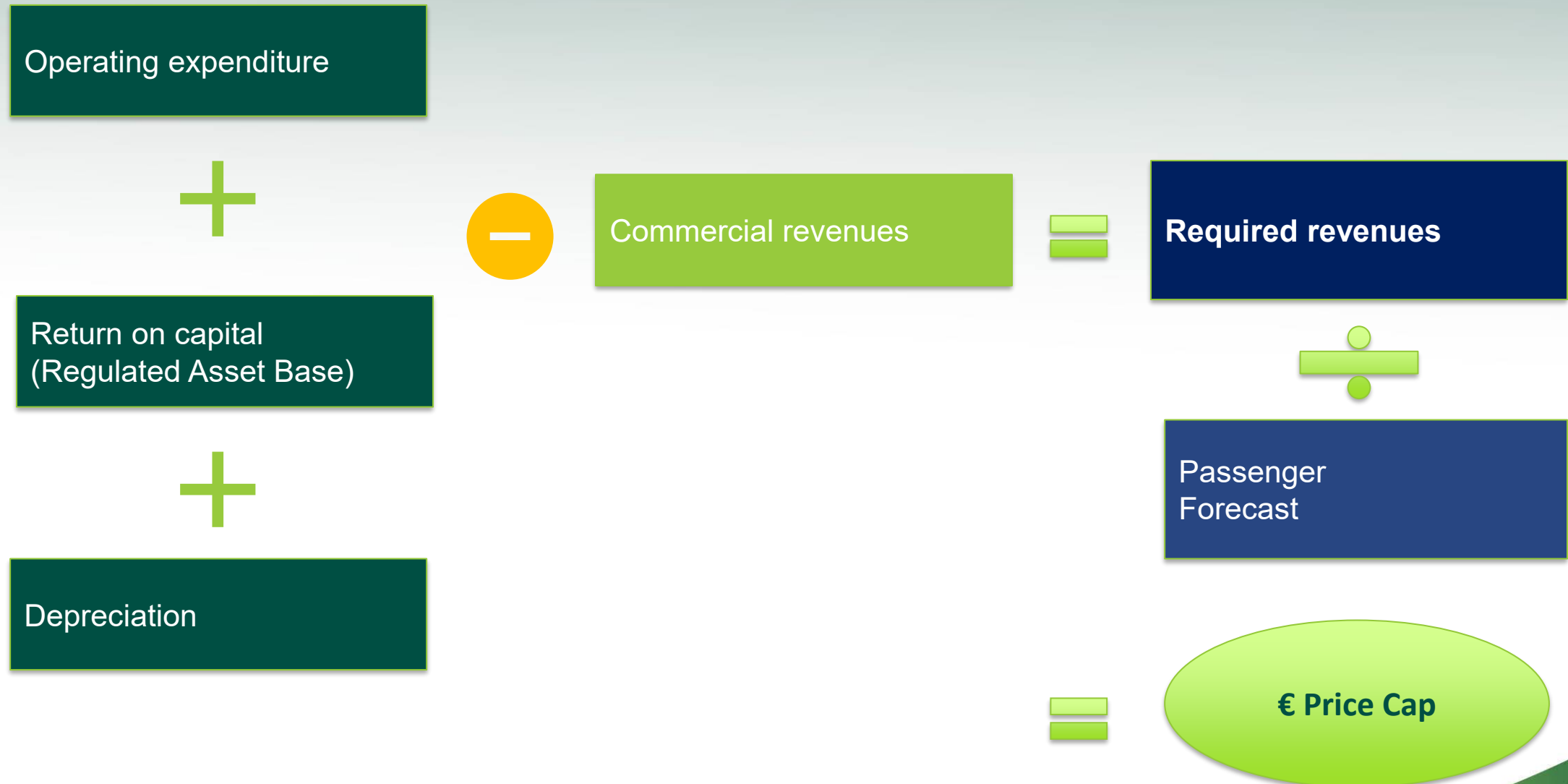
Service Quality Regime

Service targets set across 32 different categories, with price cap penalties on objective SQMS and penalties & bonuses attainable across 12 subjective metrics, set across 4 groups..

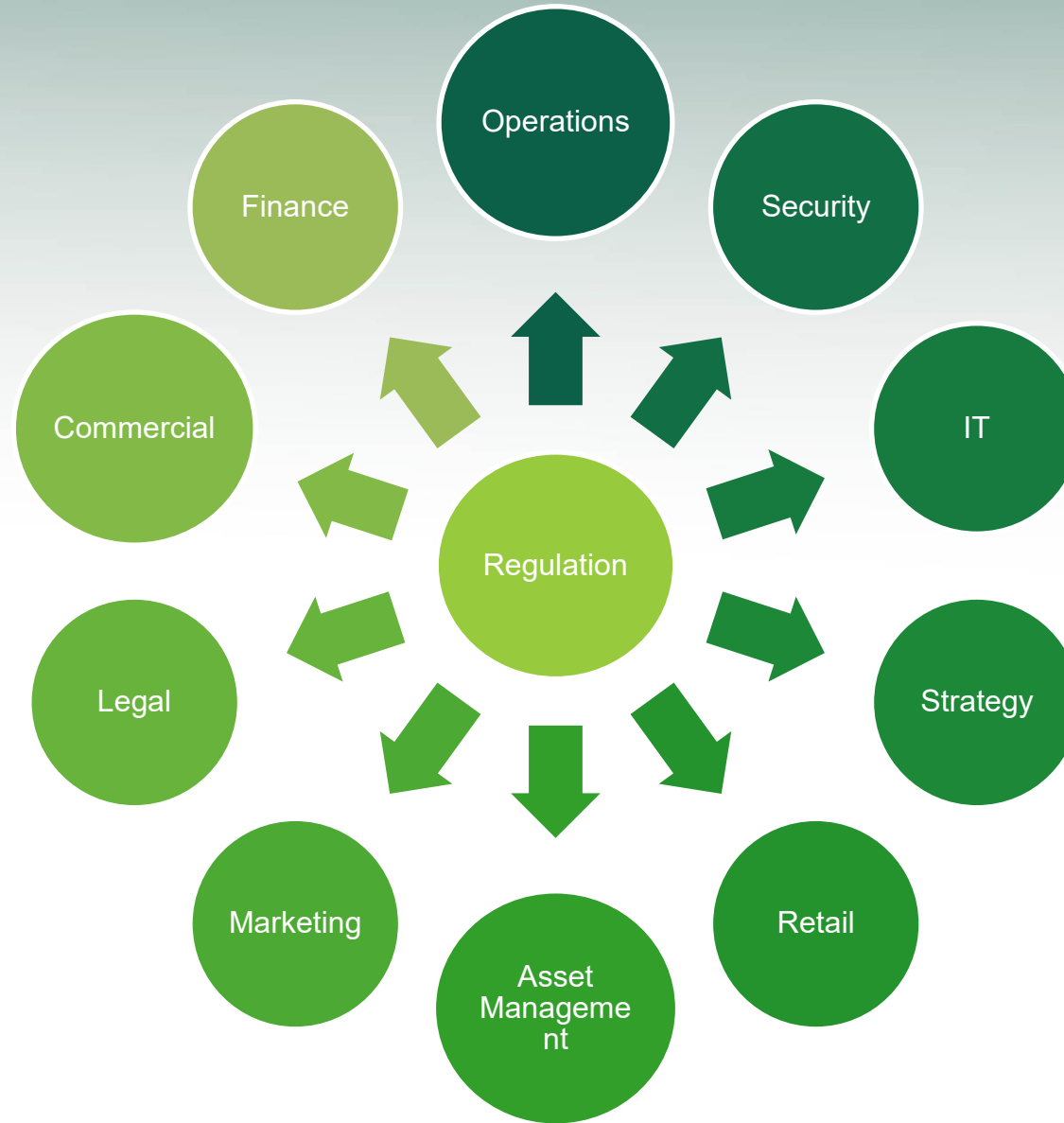
Capital Investment

All capital projects require airline consultation, cost assessment by Independent Funds Surveyor and approval by the regulator.

The Building Blocks Approach



Economic Regulation – a company wide effort



Daa 2026 Price Control Objectives:



2026 Regulatory Proposition: daa Target Deliverables

The 2026 IAA Determination must serve as the catalyst for connecting Ireland, enabling the creation of the Dublin Hub, & delivering an optimally efficient airport.

The regulatory engagement with airline customers, the IAA and broader stakeholders is the most comprehensive to date.

1) Ensure an optimal opex allowance for operational success.

2) Have IAA endorsement of the Capex Investment Programme.

3) Enable best in class safety and security: being world leaders in compliance.

4) Improving passenger security screening process timing and associated SQM metrics.

5) Enabling a skilled and committed workforce that delivers on our mission and values.

6) Prepared for all scenarios and resilient to all macro challenges with risk adequately reflected.

7) Innovating to meet industry demands: Robotic & automation, leveraging data & AI. accessibility.

8) Promote positive development in education, literacy, sports and the arts in our local communities.

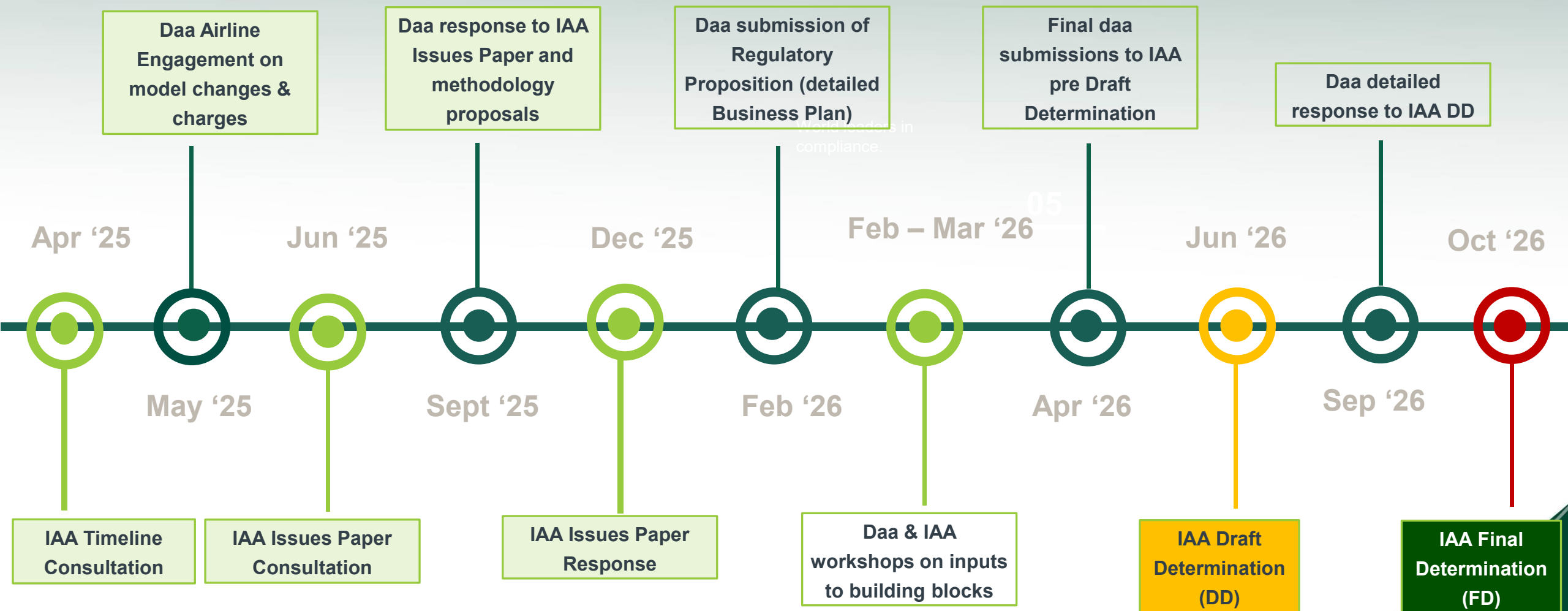
9) Progressing our ESG and sustainability achievements through marked CO2 reductions.

10) Supporting the local and national economy. Nearly 120k jobs impacted and €10bn GVA.

Delivering value for money

- To achieve all of this over the next 5 years we must have a fair regulatory settlement that enables all stakeholders' ambitions.
- Educating stakeholder how airport charges are minimal (5-15%) element of air fares.

2026 Determination Timelines



Subjective



Passenger Care

PRM Assistance

Helpfulness of security staff

Helpfulness of airport staff

Cleanliness of terminal

Cleanliness of toilets

Gates

Ease of Movement

Passenger Information

Way finding

Flight information screens

Ground transport information on arrival

Passenger Facilities and Services

PRM facilities

Availability of trolleys

WiFi

Objective



Maximum queue time at central search

PRM

Outbound baggage

Inbound baggage

FEGP

AVDGS

Escalators, lifts and travellers in T2

SSKs and bag drop machines

2025 Performance Subjective SQM Metrics

				Departures				Arrivals				Transfers	PRMS
CATEGORY	METRIC	Target	Bonus	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2025	2025
Passenger Care €0.07 max (penalty / bonus)	Overall satisfaction	8.5	9.3	8.8	8.6	8.7	8.7	9.2	9.1	9.2	9.1	8.8	9.0
	Courtesy and helpfulness of airport staff	8.5	9.3	8.9	8.9	8.9	9.0						9.3
	Courtesy and helpfulness of security staff	8.5	9.3	8.9	8.7	8.8	8.9						9.3
	Overall cleanliness of the airport terminal	8.5	9.2	8.7	8.6	8.6	8.7	8.9	9.0	8.9	9.0		8.9
	Cleanliness of washrooms	8.5	9.2	8.6	8.4	8.4	8.5	9.0	8.7	8.6	8.5		8.8
	Departure Gates	8.0	9.0	8.5	8.3	8.4	8.4						8.6
	Ease of Movement	8.0	9.0	8.7	8.5	8.6	8.6	8.9	8.9	8.8	9.0	8.6	8.5
	Additional Assistance	9.0	9.5										9.4
Passenger Information €0.04 max (penalty / bonus)	Finding your way around	8.5	9.0	8.9	8.7	8.8	8.8	9.0	8.9	9.1	9.0	8.7	8.9
	Flight information screens	8.5	9.0	8.9	8.9	8.9	8.8					8.8	8.8
	Info on Public Transport on Arrival	8.5	9.0					8.2	8.1	7.9	8.1		
Passenger Facilities & Service €0.04 max (penalty / bonus)	Availability of Baggage trolleys	8.5	9.0	8.9	8.7	8.8	8.8	9.4	9.0	9.0	9.1		*
	Satisfaction with free Wi-Fi	8.5	9.0	9.2	9.0	8.9	8.9	9.3	9.1	8.9	9.0		*
	Facilities for those requiring additional assistance	9.0	9.5										9.2

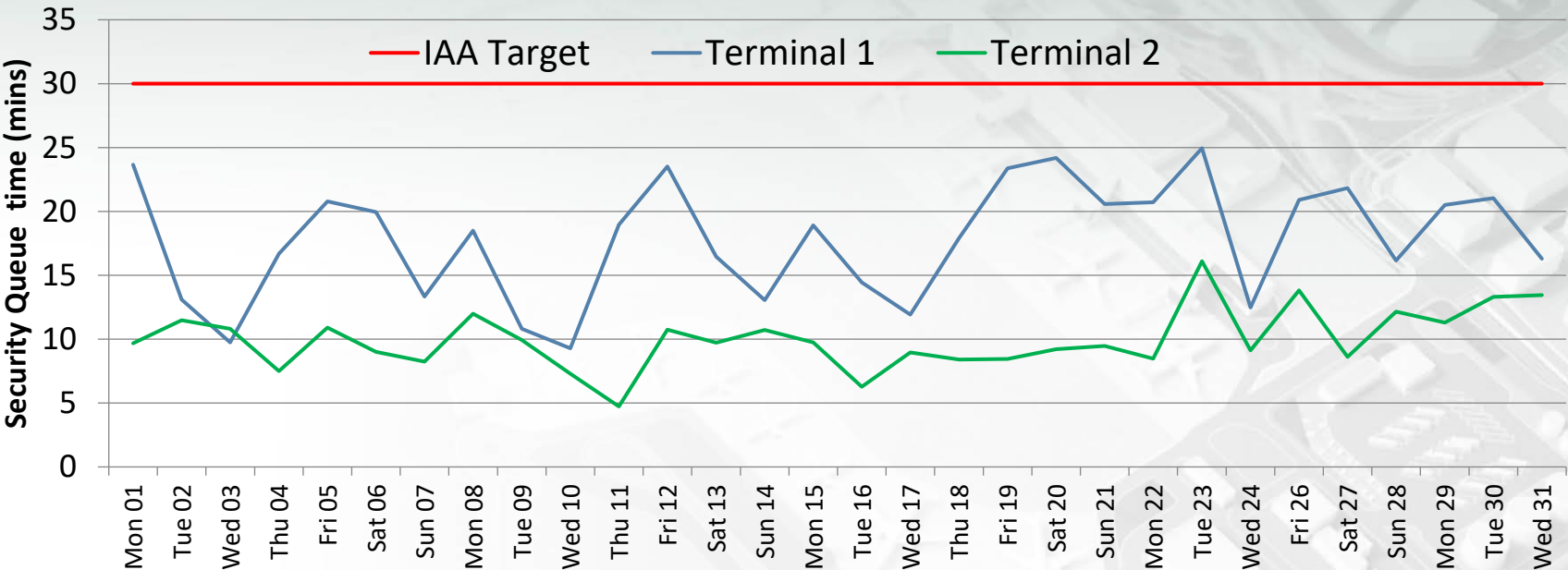
IAA SQMs 2025		
Category	Bonus	Breach
Pax Care	3	2
Pax Info	3	4
Pax Facilities & Service	7	
Total	13	6

- Bonus Achieved
- Target Met
- Target Breached

* Low sample size

Monthly Results – December 2025

IAA Daily Max Security Queue T1 & T2





Target

98%

Actual

99.96%



Target

99%

Actual

99.95%



Baggage Outbound Availability

No request was received from handling agent or airline for use of an alternative belt.

PASS



Self-Service Kiosk Availability

Target

99%

Actual

99.11%



Baggage Inbound Availability

No request was received from handling agent or airline for use of an alternative belt.

PASS



T2 Passenger Facing Lifts & Escalators

Target

98%

Actual

99.68%

Dublin Airport Insights Overview

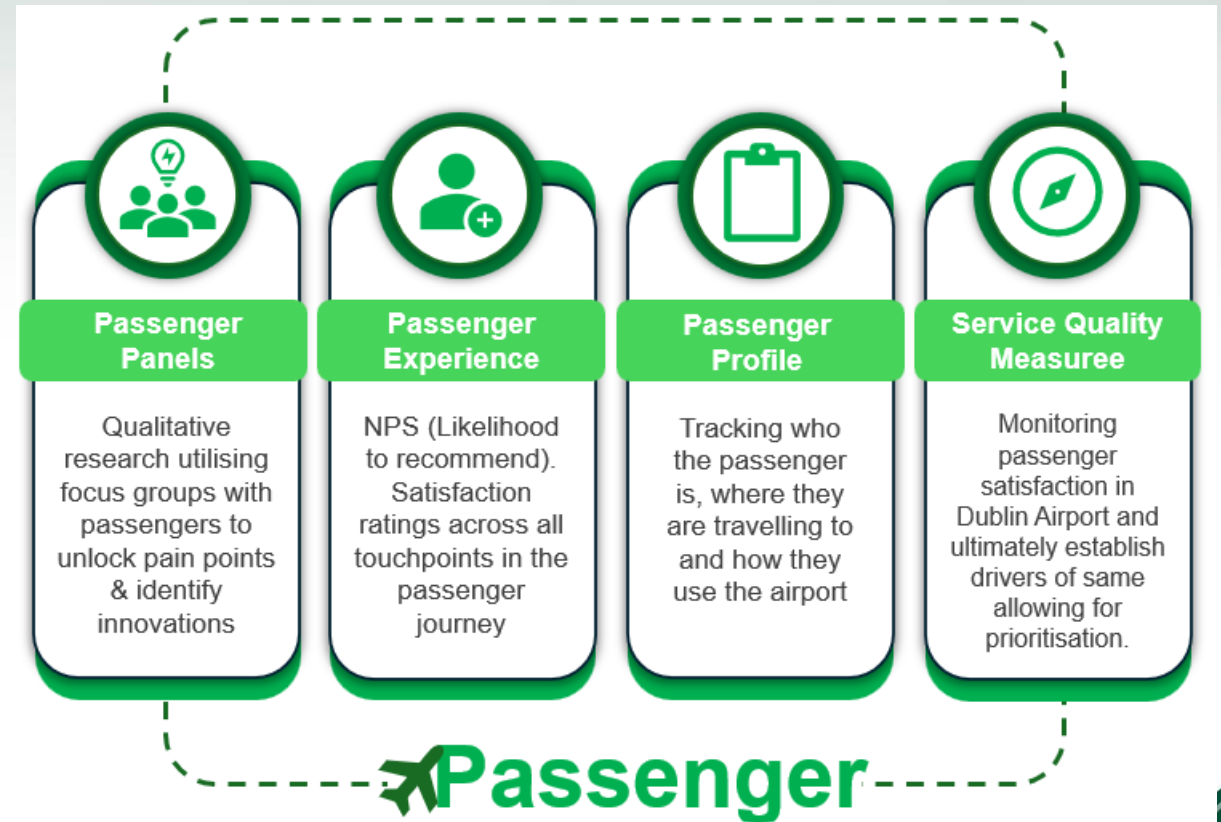
How Dublin Airport stays close to the passenger through continuous passenger research

DUB utilises passenger research to understand the ever evolving passenger profile and their changing needs

The insights team in daa work with our research partners, such as RedC, to understand every facet of the passenger experience.

We utilise multiple different types of research methodologies to unlock passengers experience, pain points and profiles.

Our goal is to continuously track passenger experience to identify changing passenger trends and continue to provide an efficient and pleasant passenger experience.



Passenger panel events provides a wealth of insight into passengers' experience in the airport, outside of statistics



Overview of the programme

Two separate, two hour sessions take place, one with **frequent travellers** and the other with **infrequent**.

Frequent travellers are those who travel four+ times a year.

Participants prepare a travel diary ahead of the sessions, evaluating their **experience in DUB** and their return airport.

Senior leadership attend both sessions, providing passengers with an opportunity to discuss their pain points at the airport.

Passenger Journey

Every element of the passenger journey is discussed, from check-in to arrivals back into Ireland.

Pain Points and Areas of Improvement

Area of improvement were identified through panellists discussing pain points along their airport experience.

Experience with app, F&B outlets and Dublin Airport Duty-Free

Understanding gaps within the services provided by the airport and the Dublin Airport app.



Key passenger experience themes from Passenger Panel 2024 and the changes passengers noticed in 2025



SECURITY

Can be the most stressful stage in the journey. Passengers appreciate visible staff, multiple lanes open, flowing queues with staff in control. Felt that this has **improved significantly over recent years.**



COMFORT

Seating shortages at busy times and limited charging points impact relaxation and enjoyment. Again, both frequent and infrequent passengers have **noticed an improvement** in seat availability.



TECHNOLOGY

Investments in technology help with maintaining predictability in the airport and streamline the journey. The app and WhatsApp are great features, but **usage and awareness is low.**



RETAIL

Duty Free often a highlight after stress of security subsides. When inflation bites, value perception in Duty Free decline and **awareness of value was limited.**



FOOD & BEVERAGE

Passengers want a wider range of dining options that have plentiful seating, are good value and suited to different needs (vegetarian, gluten-free etc.). Wait times and availability **were recurring pain points.**



Operational Excellence

Passengers consistently refer to improvements being made by Dublin Airport.

Panel members report that there appears to be a **laser-focus** on making the passenger experience process as **efficient** as it can be. This is reflected across nearly all touchpoints on the passenger journey, where passengers can see marked improvements in recent years.



Experiential Excellence

Participants report great leaps made on the enjoyment of being a passenger in Dublin Airport.

Feeding into this overall **sense of enjoyment** is a low-stress environment, **improvements to F&B, the retail experience** as well as improvements to **seating and facilities**.



Personnel Excellence

Frontline team members are our ambassadors; they are highlighted by passengers as a key element of positive experiences at the airport.

This is seen as a relatively unique strength, particularly in the European context:

- **Friendly and full of personality** (uniquely Irish which contributes to sense of place)
- Given **autonomy** to make decisions to improve passenger experience
- Seen as **experts** – whatever their role they appear capable and knowledgeable.

Staff: The heart of the Dublin Airport experience



Warmth and Helpfulness

Passengers consistently describe staff as the defining element of Dublin Airport’s atmosphere. Friendliness, humour, unique personalities and empathy create a sense of calm and connection.

Implication: Preserve and celebrate this warmth; it’s central to Dublin Airport’s identity. Consider how this can be translated for US passengers.

Reassurance and Practical Support

Staff visibility and calm communication transform high-stress moments into reassurance, especially for families, older travellers and PRMs.

Implication: Proactive presence at key friction points (security, arrivals, wayfinding) lowers anxiety and reinforces a sense of care and attention at Dublin Airport.

Consistency and Empowerment

Passengers notice when airport staff feel confident and empowered to help; it signals competence and builds trust. The best experiences happen when staff have the agency to act.

Implication: Continue investing in staff training and empowerment, small acts of initiative and ownership create passenger goodwill.

“Good humour and kindness made a big difference.” - UK Passenger

“Staff were friendly and helpful... someone let us skip ahead in customs because we had a tired baby.” - US passenger

IAA SQM	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025
Departures	9.0	9.0	8.9	9.0	8.9	8.9	8.9	9.0
Arrivals	8.8	8.5	8.6	8.9	9.0	8.7	8.6	8.4

Passenger tracking study provides a profile of the pax

In Q3 of 2025, the passenger profile remained mostly stable. There was an increase in VFR travel, as well an increase in passengers from the C2DE social class

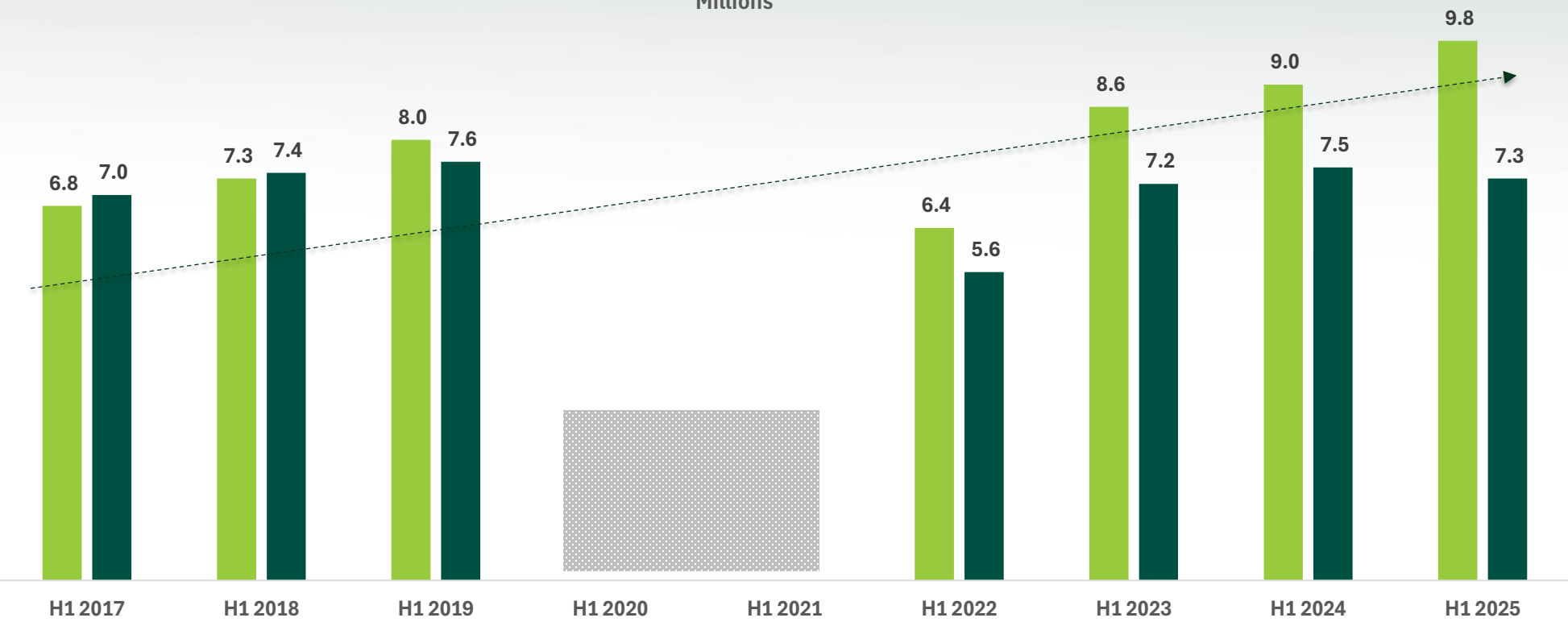


Female traffic grew from 6.8 Mil to 9.8 Mil between H1 2017 & H1 2025

Volume of air traffic at Dublin Airport
Total Passengers x Gender
Millions



Female
Male



Source: Dublin Airport Customer Satisfaction Tracking

This is not just a trend seen in Dublin Airport.

Women are reshaping travel as key decision makers



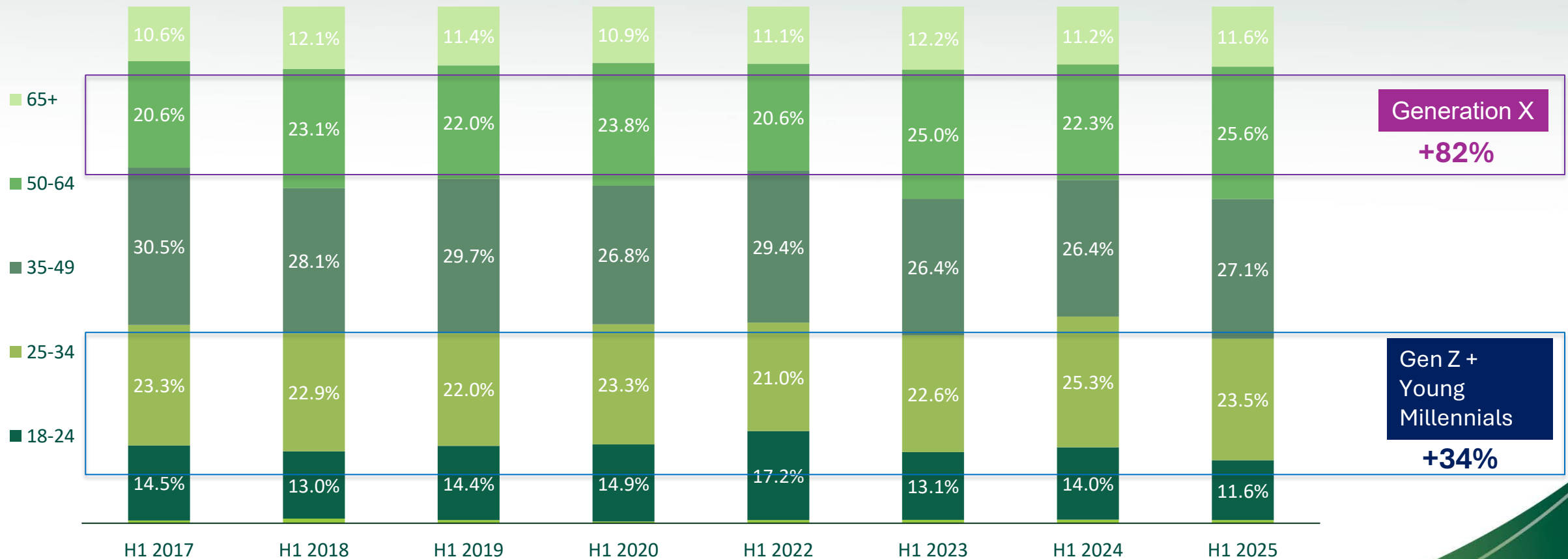
- 82% of all travel decisions are made by women in 2025.
- 2025 63% of global travellers are women (Up 4% V 2024).
- 45% of women interested in travel alone in 2025, 8% up on 2024.
- 65% of women in the USA have vacationed without partner.
- Travel companies for women only increased by 230% since 2022
- 75% of those who take adventure, cultural or nature trips are women.





Looking just at Irish residents, the growth in female passengers has come through two key cohorts

Age of Irish resident female passengers
H1 2017 to H1 2025

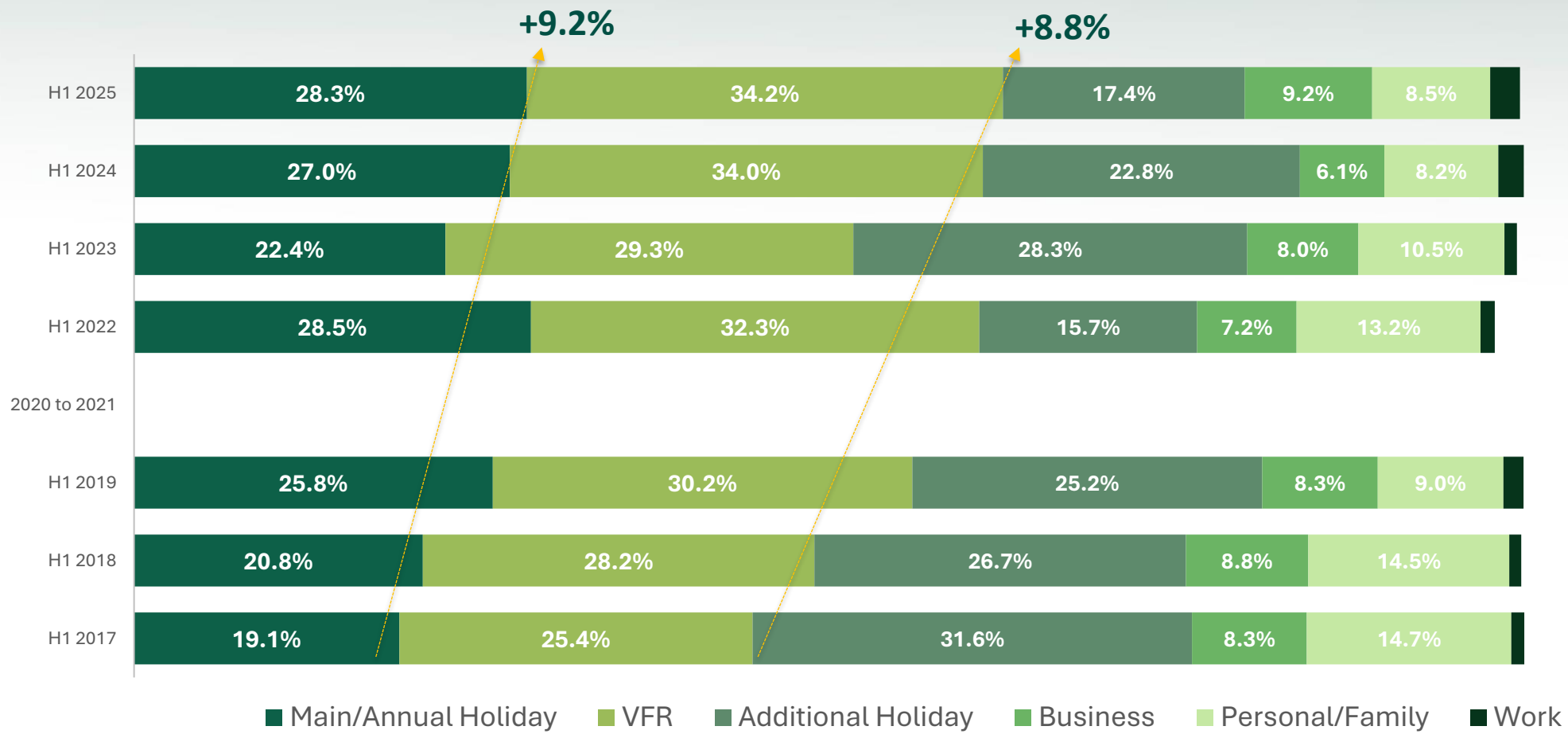


Source: Dublin Airport Customer Satisfaction Tracking



GenX women are travelling more for main holiday and to visit friends and relatives around the world

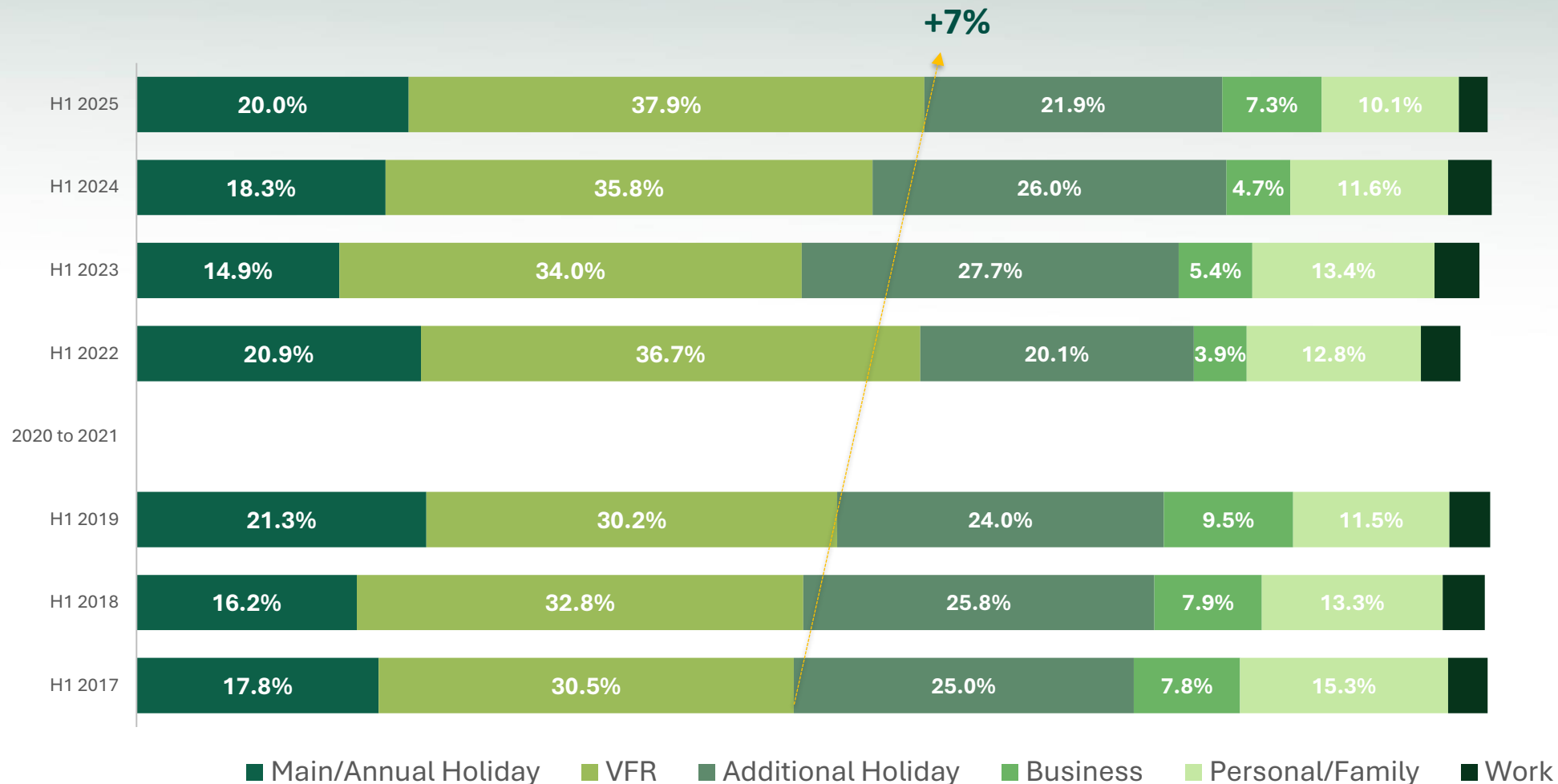
Reason for travel of **50-64yr old** female passengers
H1 2017 to 2025



Source: Dublin Airport Customer Satisfaction Tracking

While GenZ, with 17% born outside of Ireland, are travelling to visit home or friends abroad

Reason for travel of **18-34yr old** female passengers
H1 2017 to 2025



Dublin Airports Food & Beverage offering is a key element of the female passengers journey

True Users of F&B skews Female and VFR traveller

True F&B Users



Female: 64% +5 YoY

VFR: 31% +3 YoY



Those who purchased F&B products from a Dublin Airport owned outlet are more likely to be **women** and this share of trade is **growing year on year**.

Men and Women want similar things from F&B, with one notable difference



A hot beverage (coffee/tea) is a necessity for me as I go through the airport

61% of women agree
(vs 49% of men)



I like to have an alcoholic drink at the airport when I take a trip

38% of Men agree
(vs 26% of women)

Passenger Satisfaction SQMs		Target	Bonus	Dept	Arrivals	Transfers	PRM Dept
				Quarterly	Quarterly	Annually	Annually
Pax Care	Overall satisfaction	8.5	9.3	x	x	x	x
	Cleanliness of Washrooms	8.5	9.2	x	x		x
	Additional assistance	9.0	9.5				x
	Helpfulness of security staff	8.5	9.3	x			x
	Helpfulness of airport staff	8.5	9.3	x			x
	Cleanliness of terminal	8.5	9.2	x	x		x
	Satisfaction with Departure gates	8.0	9	x			x
	Ease of Movement	8.0	9	x	x		x
Pax Information	Finding your way around	8.5	9	x	x	x	x
	Flight information screens	8.5	9	x		x	x
	Ground transport information on arrival	8.0	8.5		x		
Pax facilities & service	Facilities for passengers who require additional assistance	9.0	9.5				x
	Availability of trolleys	8.5	9	x	x		
	Satisfaction with Wi-Fi	8.5	9	x	x		

Dublin Airport is evaluated across **14 subjective metrics**, across both Arrivals and Departures, Transfer passengers and PRM.

This study helps Dublin Airport establish key drivers of customer satisfaction and allows the airport to prioritise actions and initiatives.

However, unlike the objective SQMs, these are **subjective SQMs**. This means that passengers surveyed and asked about their individual experience at the airport.

Compared to objective SQMs, subjective SQMs which are open to biases and as a result additional due diligence are applied to collection.

Subjective SQMs have a different methodology vs the objective SQMs

To guarantee impartiality, the subjective SQM research is managed by market research agency RedC.

They utilise experienced market researchers to conduct thousands of face-to-face interviews on site in Dublin Airport.

Passengers are asked a series of questions, largely asked to scale their experience between 1-10.

One exception is the Ground transport information on arrival metric, which has a dual methodology of face-to-face and online surveys.

Daa reviews the sample size each year and may increase it based on passenger numbers.

Departures Methodology

Face to face interviews via tablet at the Departure gates. Collection by research partner RedC

Annual sample size
n= 5,550

Question types: Largely scale questions (0-10), some single variable, multi variable

Results reported quarterly

Arrivals Methodology

Face to face interviews via tablet at the Arrivals baggage hall. Collection by research partner

Annual Sample size: n=2,700

Question types: Largely scale questions (0-10), some single variable, multi variable

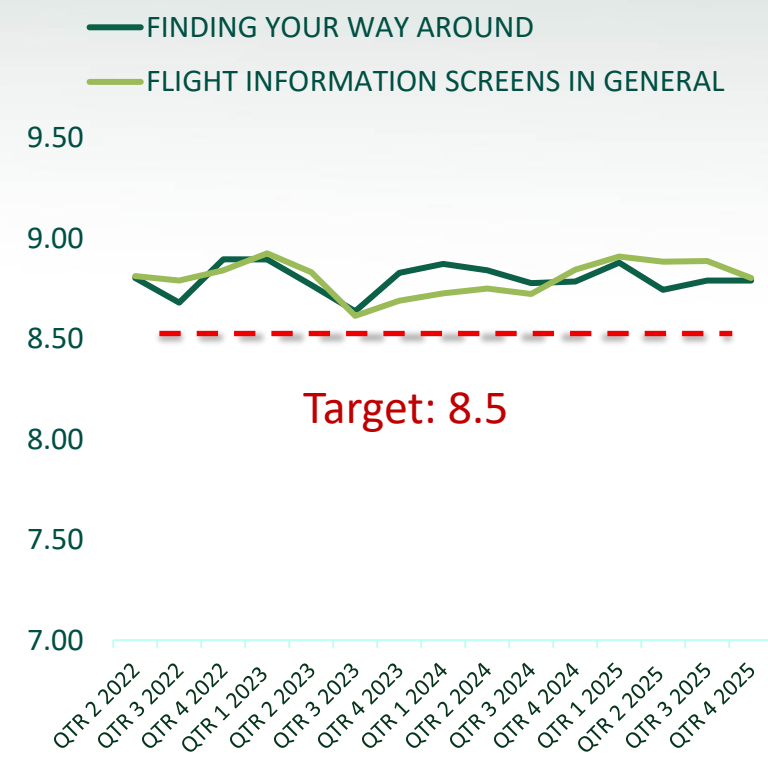
Results reported quarterly

Trend analysis of the passenger surveys from 2022 to present.

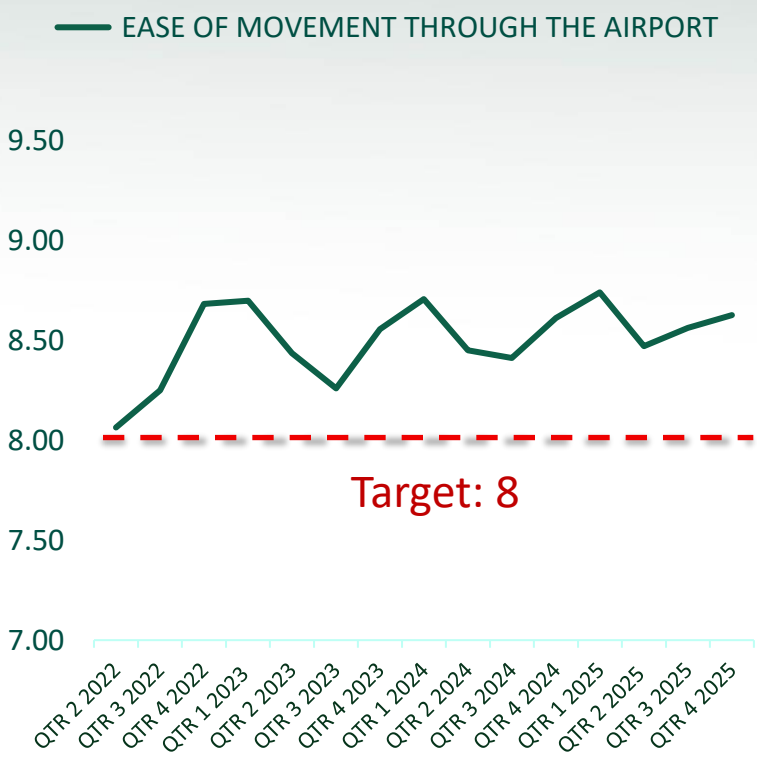
How have we been performing to date

We excel in many departure areas and continue to protect and maintain exceptional scores

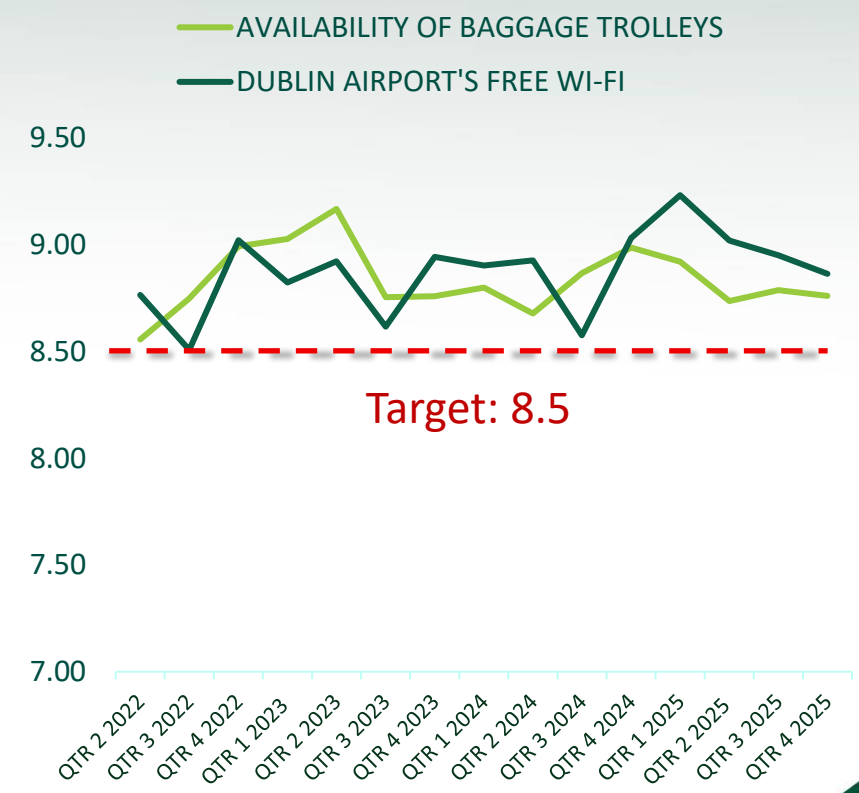
WAYFINDING



MOVEMENT



FACILITIES

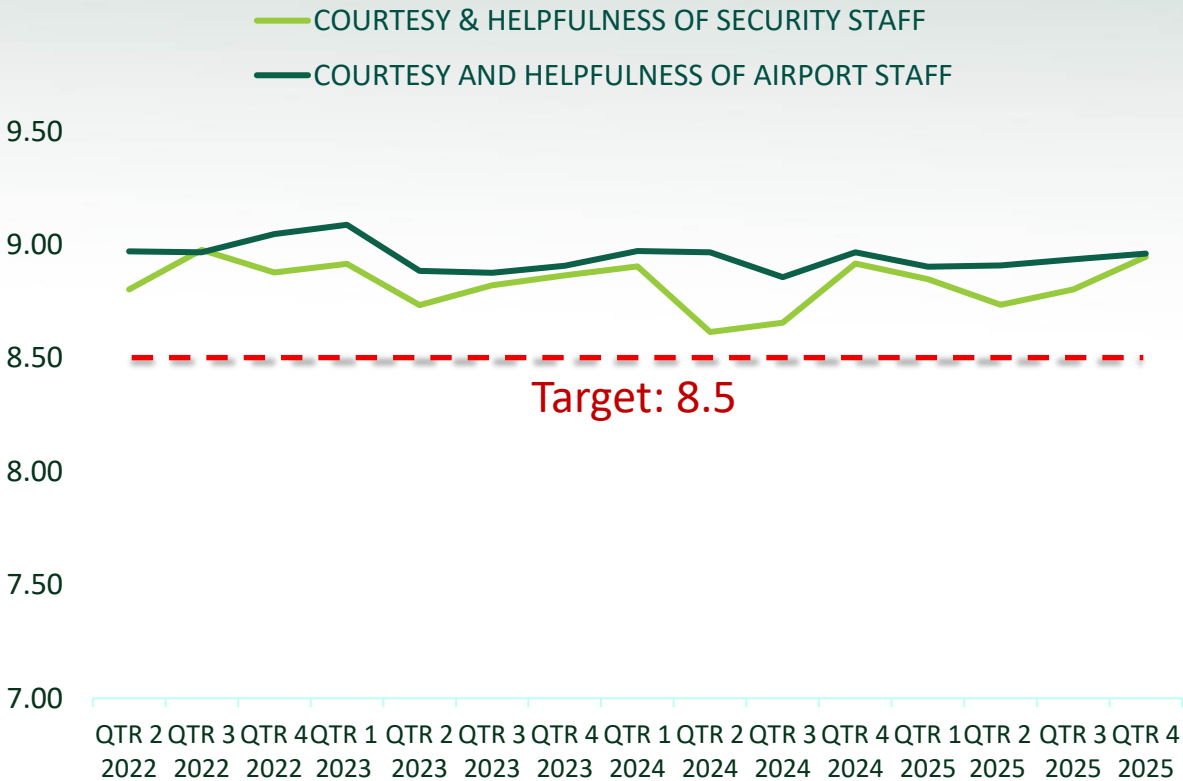


Charts present a subset of IAA scores to keep insights focused

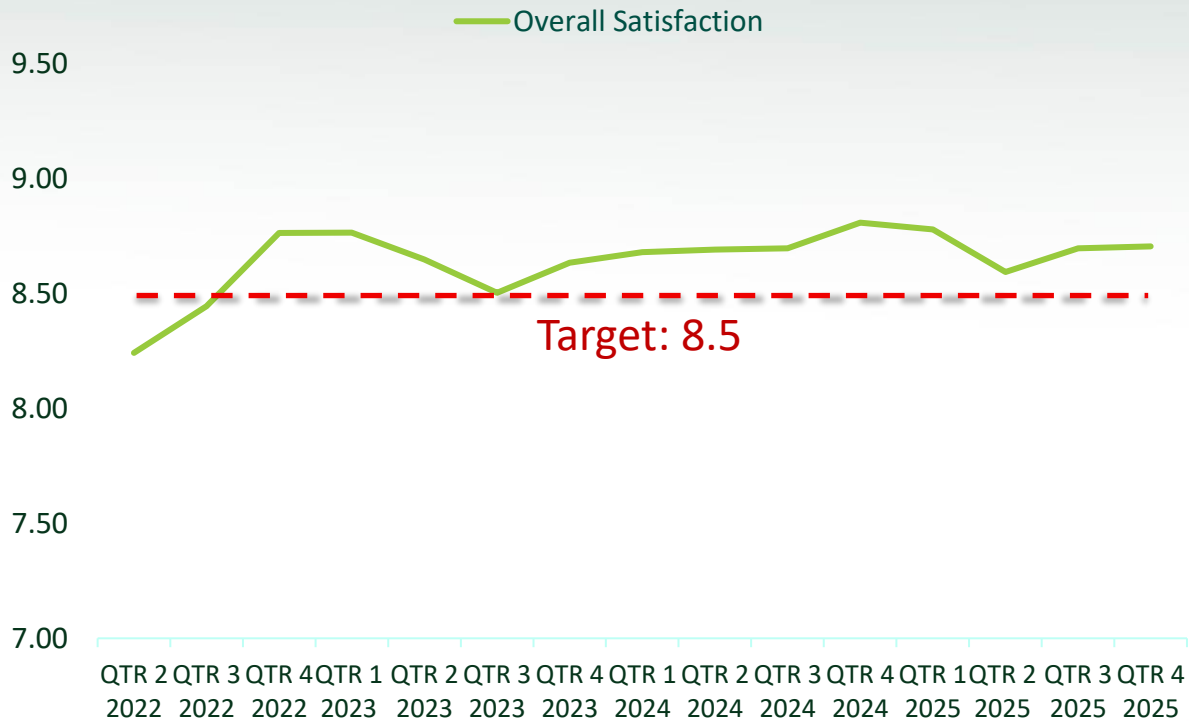
Source, REDC, CSM Departures Data

Which leads to strong overall satisfaction across the entire departure passenger journey

STAFF



OVERALL SATISFACTION WITH DEPARTURE EXPERIENCE

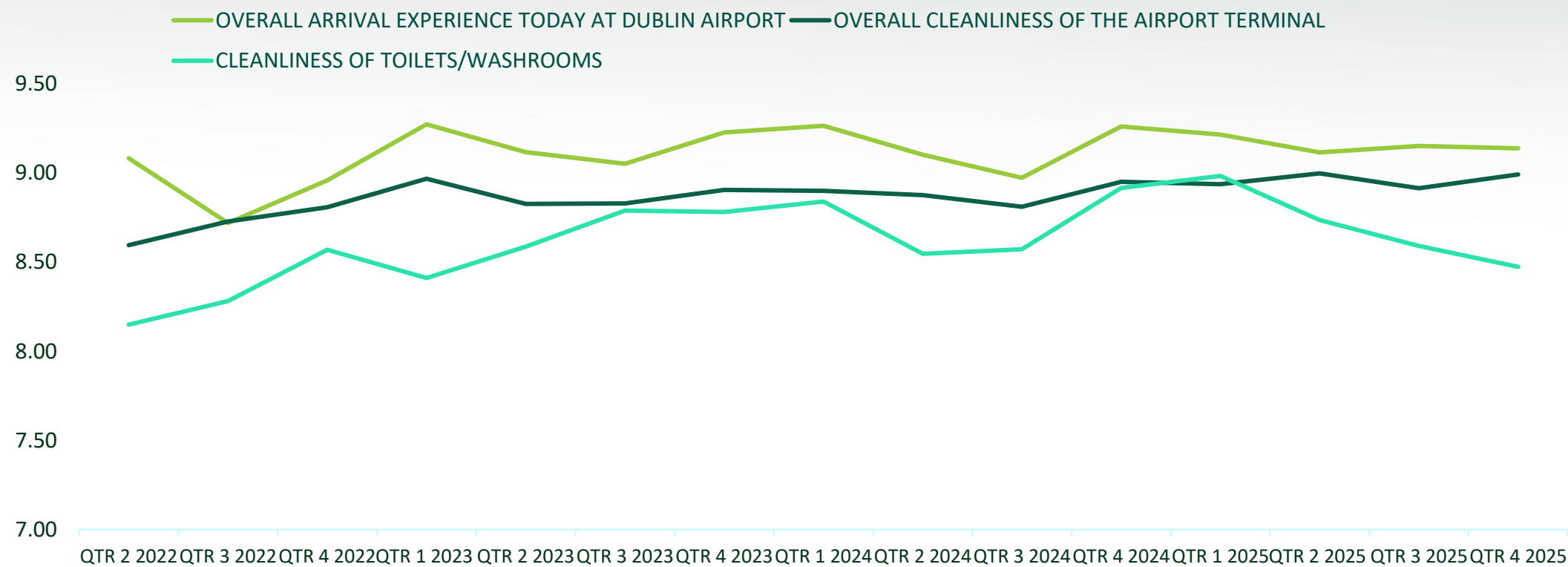


Charts present a subset of IAA scores to keep insights focused

Source, REDC, CSM Departures Data

And we also provide an exceptional arrival journey experience, meeting scores outlined

Arrival scores



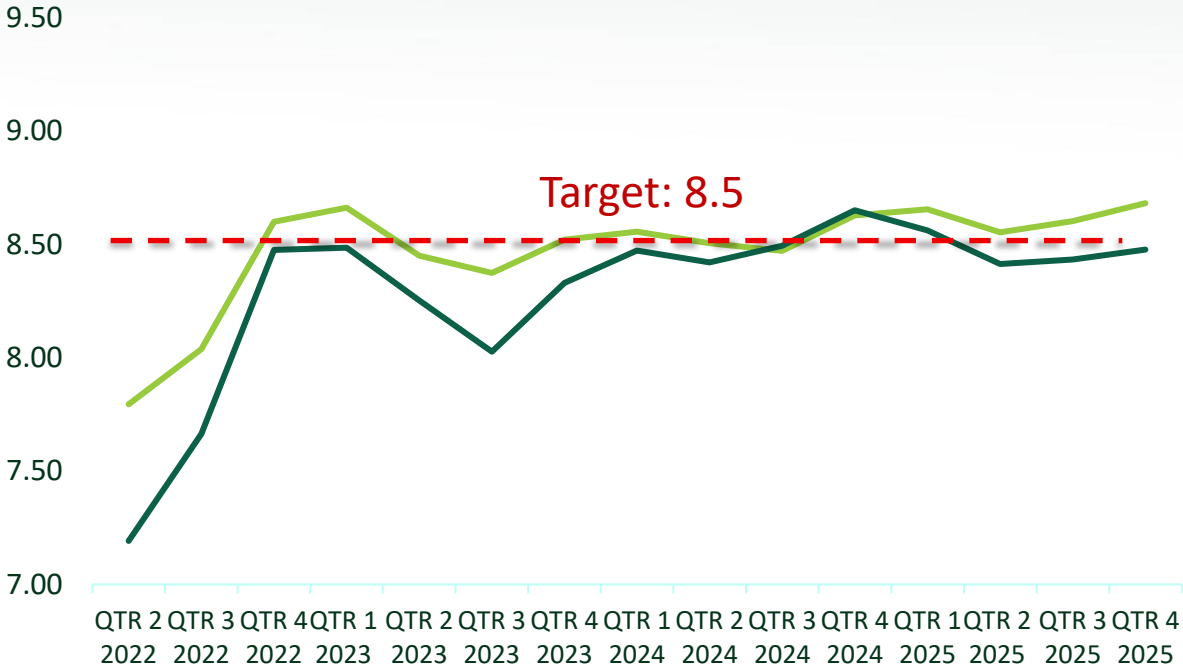
Charts present a subset of IAA scores to keep insights focused

Source, REDC, CSM Arrivals Data & Arrivals On My Way Data

And although there is still work to be done, we are moving in the right direction

CLEANLINESS

- OVERALL CLEANLINESS OF THE AIRPORT TERMINAL
- CLEANLINESS OF TOILETS/WASHROOMS



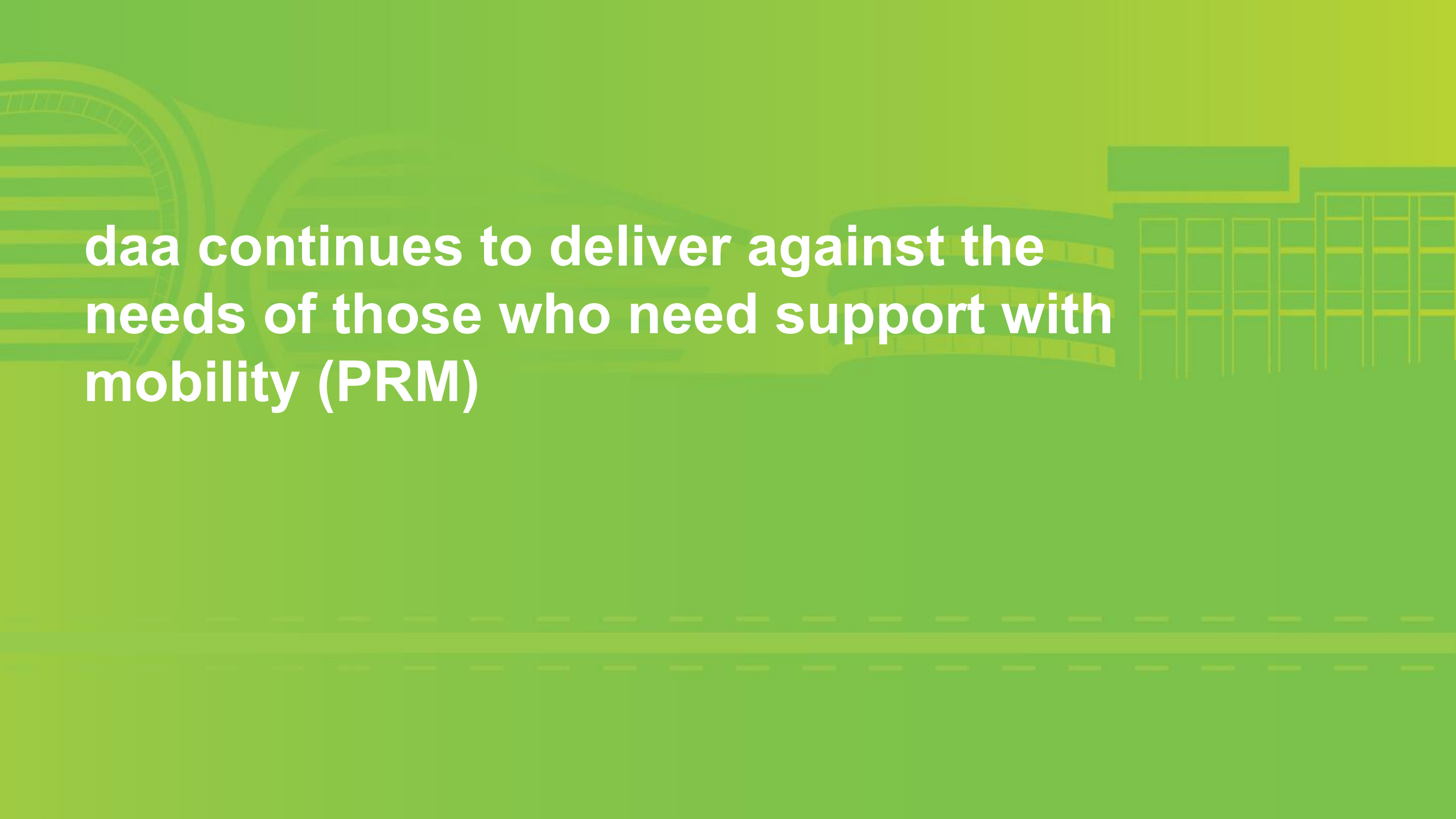
Charts present a subset of IAA scores to keep insights focused

Ground transport information on arrival

- Information provided by Dublin Airport on arrival about public transport



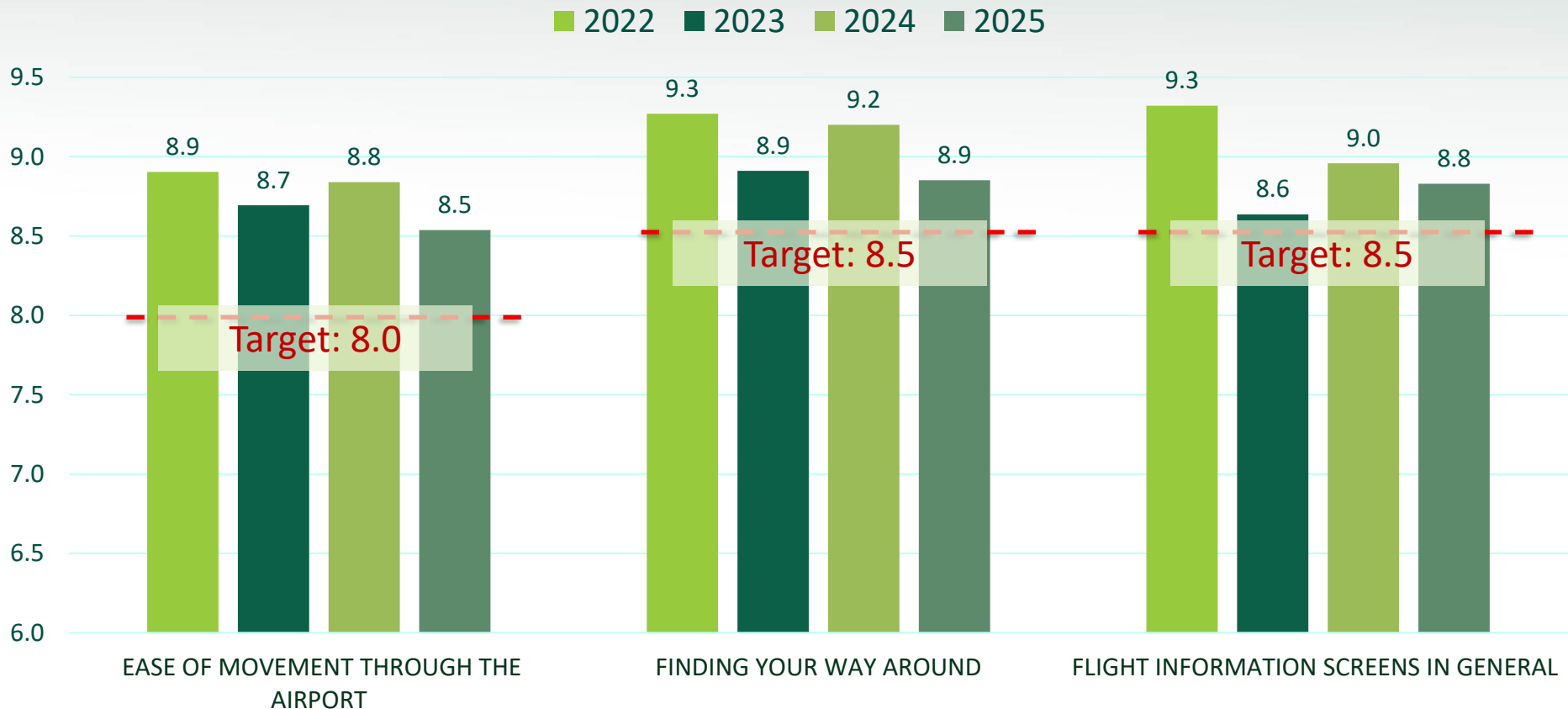
Source, REDC, CSM Departures Data & Arrivals On My Way Data

The background is a solid green color. On the left side, there is a faint, stylized illustration of a building with a semi-circular archway. On the right side, there is a faint, stylized illustration of a multi-story building with many windows. At the bottom of the image, there are horizontal dashed lines representing a road or a path.

**daa continues to deliver against the
needs of those who need support with
mobility (PRM)**

We are delivering excellent service to those who need it most, especially on movement through the airport

PRM PAX

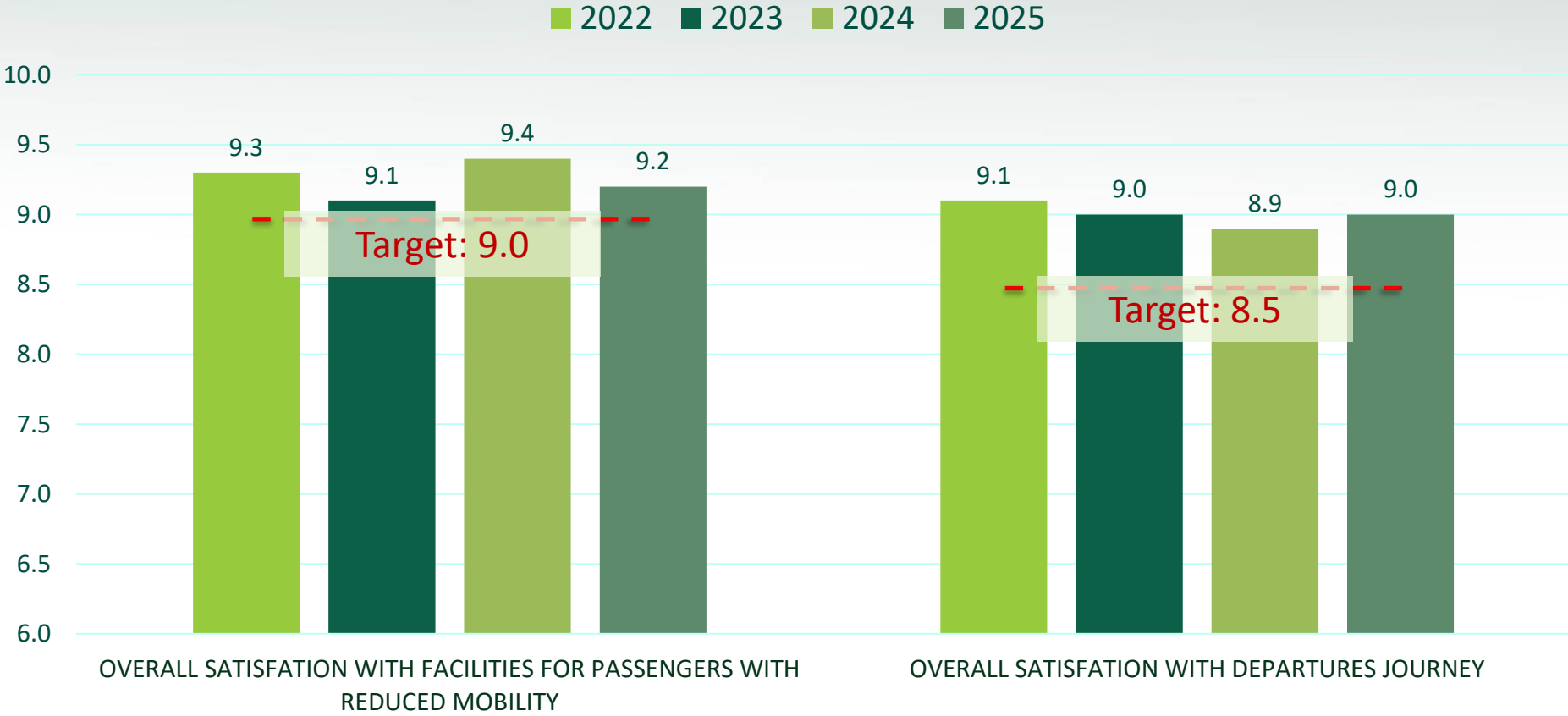


Charts present a subset of IAA scores to keep insights focused

Source, REDC, CSM [Departures](#) Data

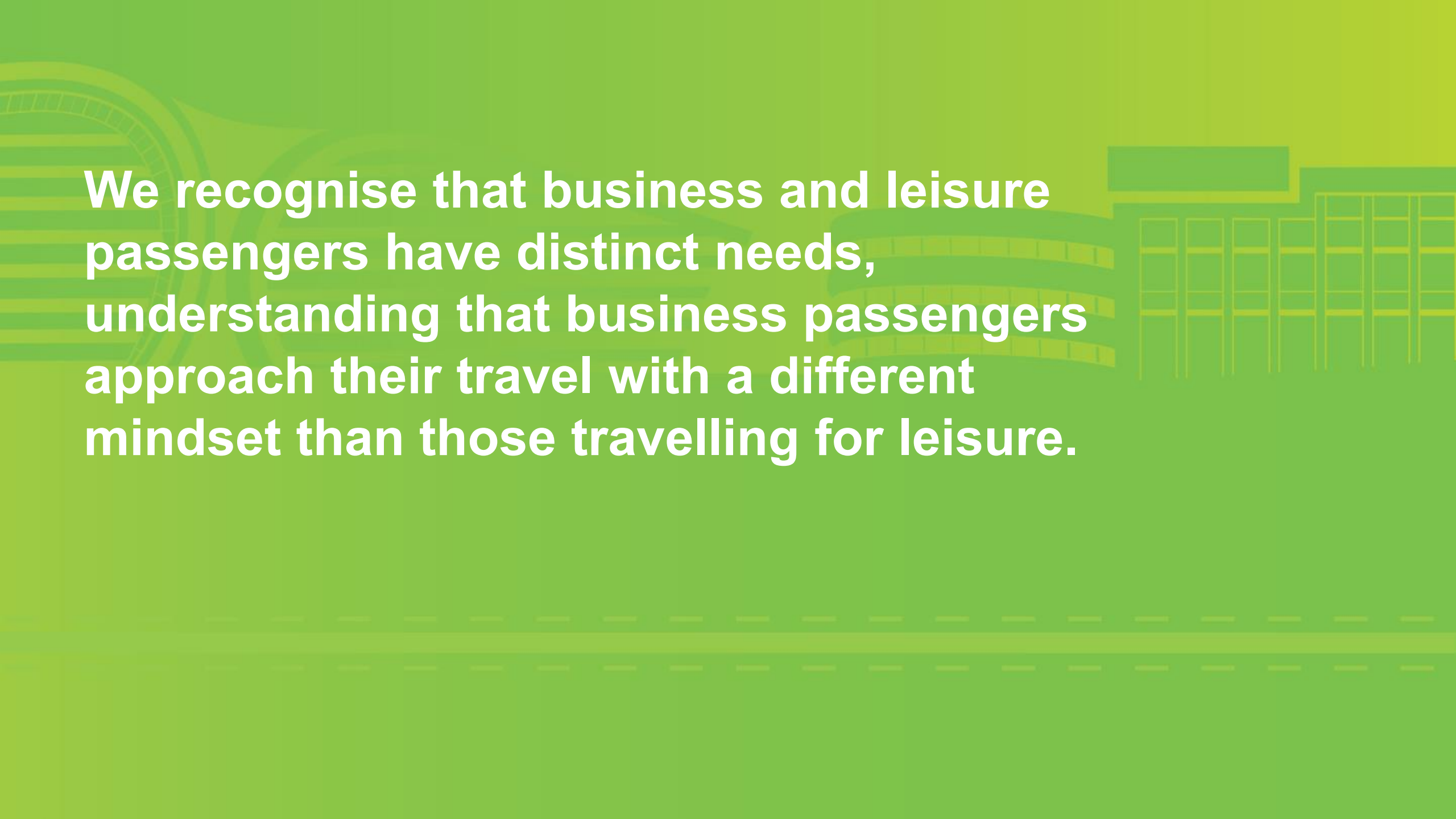
Which has a direct impact on overall satisfaction, and is amongst some of the strongest satisfaction scores in the airport

PRM PAX



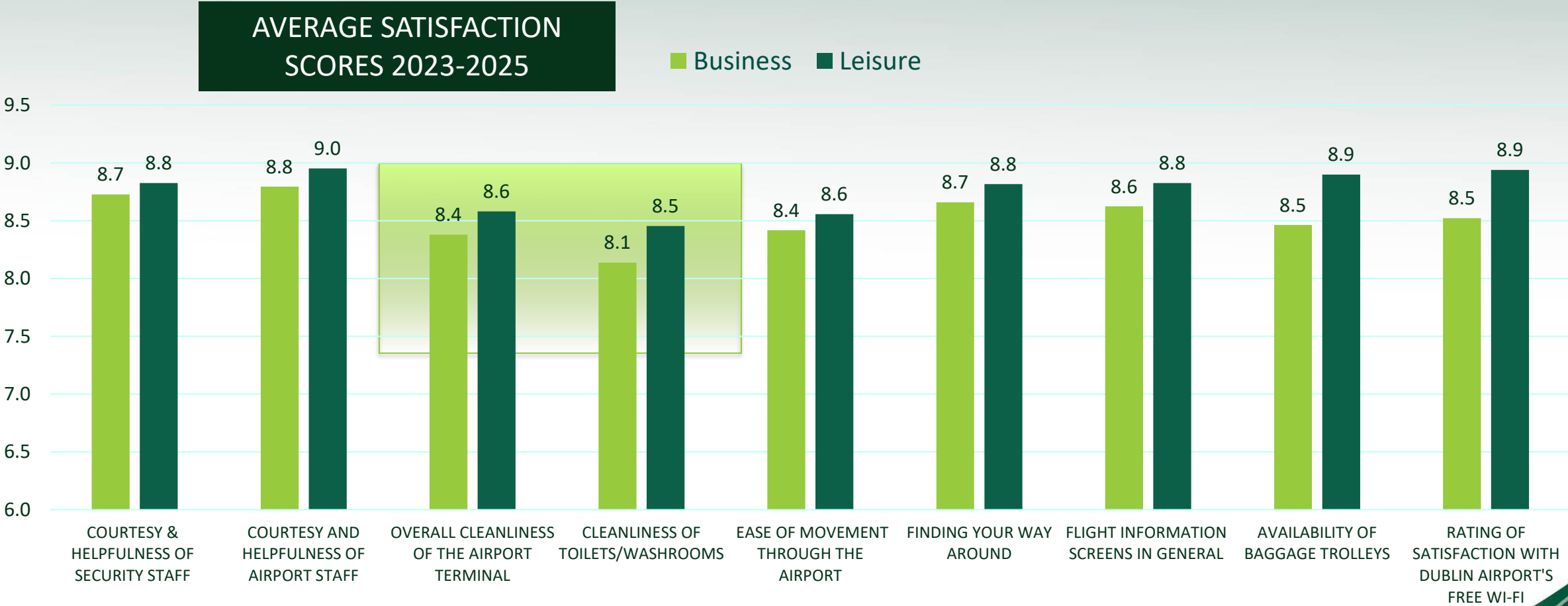
Charts present a subset of IAA scores to keep insights focused

Source, REDC, CSM [Departures](#) Data

The background is a solid green color. On the left side, there is a faint, stylized illustration of an airport terminal building with a curved roof and several windows. On the right side, there is a faint, stylized illustration of a road with dashed white lines receding into the distance. The text is centered in the upper half of the image.

We recognise that business and leisure passengers have distinct needs, understanding that business passengers approach their travel with a different mindset than those travelling for leisure.

Passengers come with a different mood and mindset depending on their trip purpose: business passengers are difficult to delight



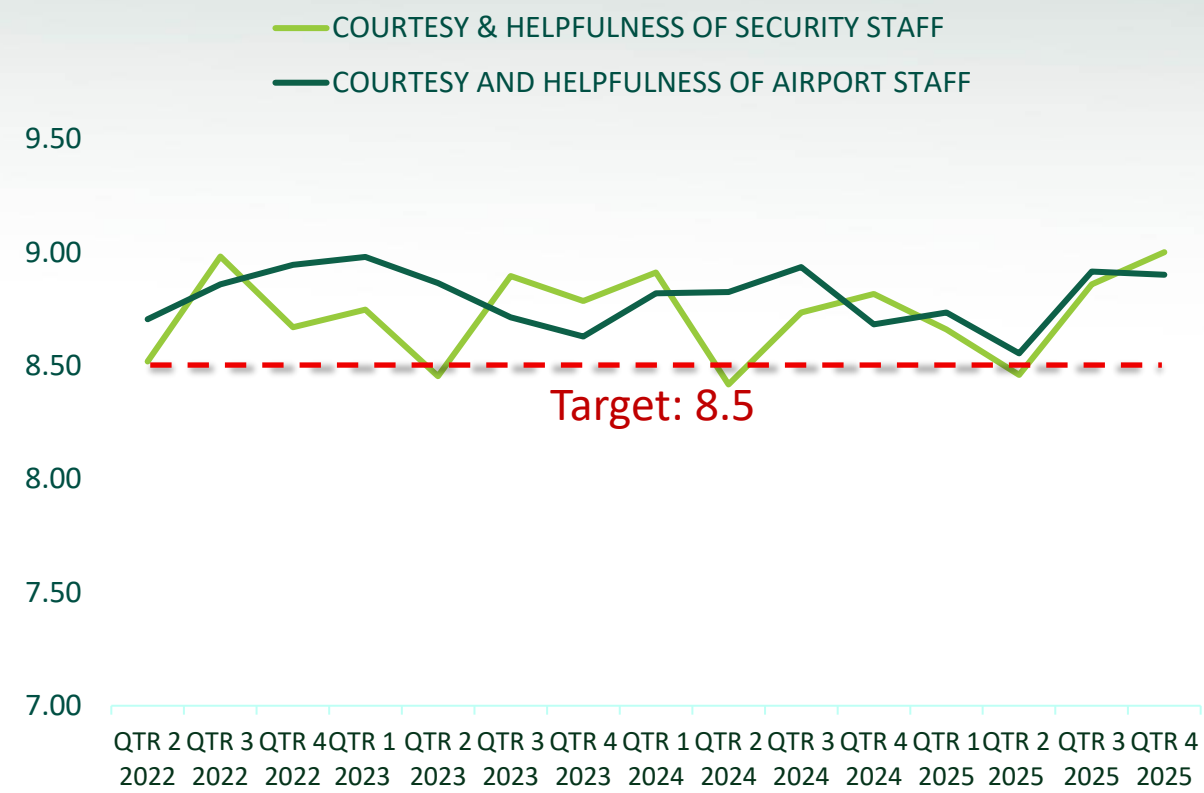
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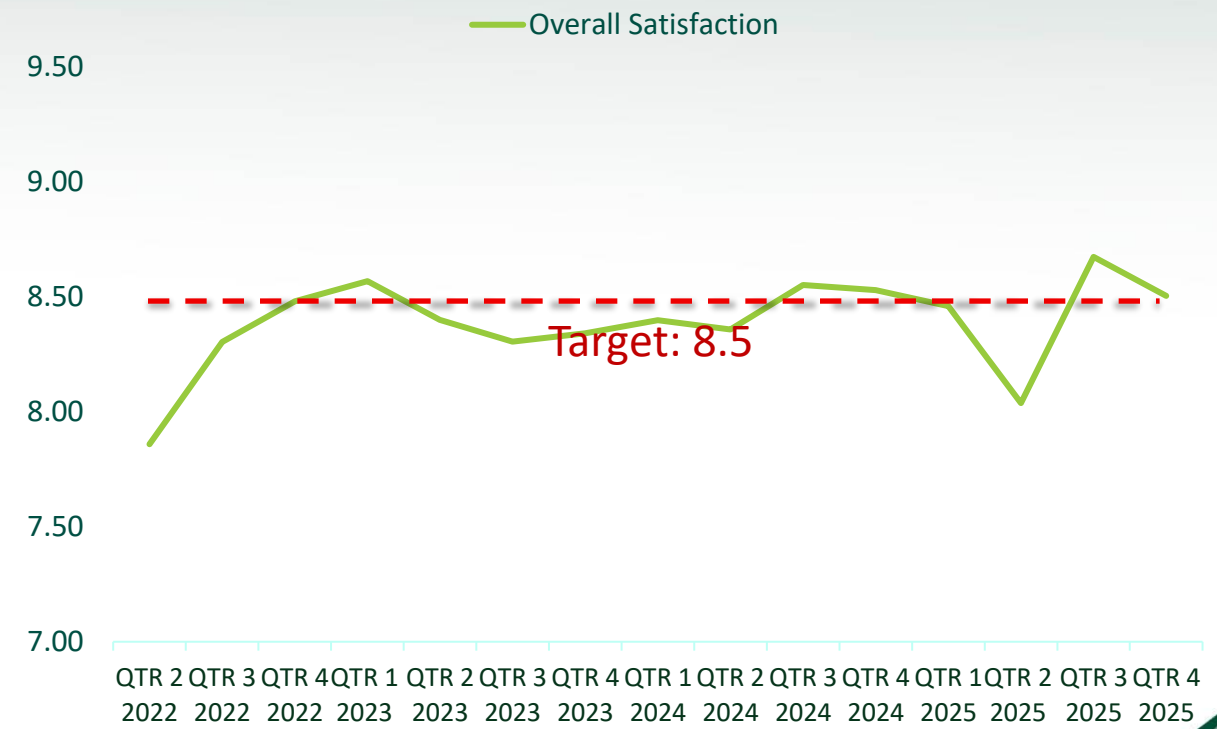
Our staff return excellent satisfaction scores amongst business passengers, and ultimately a strong overall journey

BUSINESS PAX

STAFF



OVERALL SATISFACTION WITH DEPARTURE EXPERIENCE



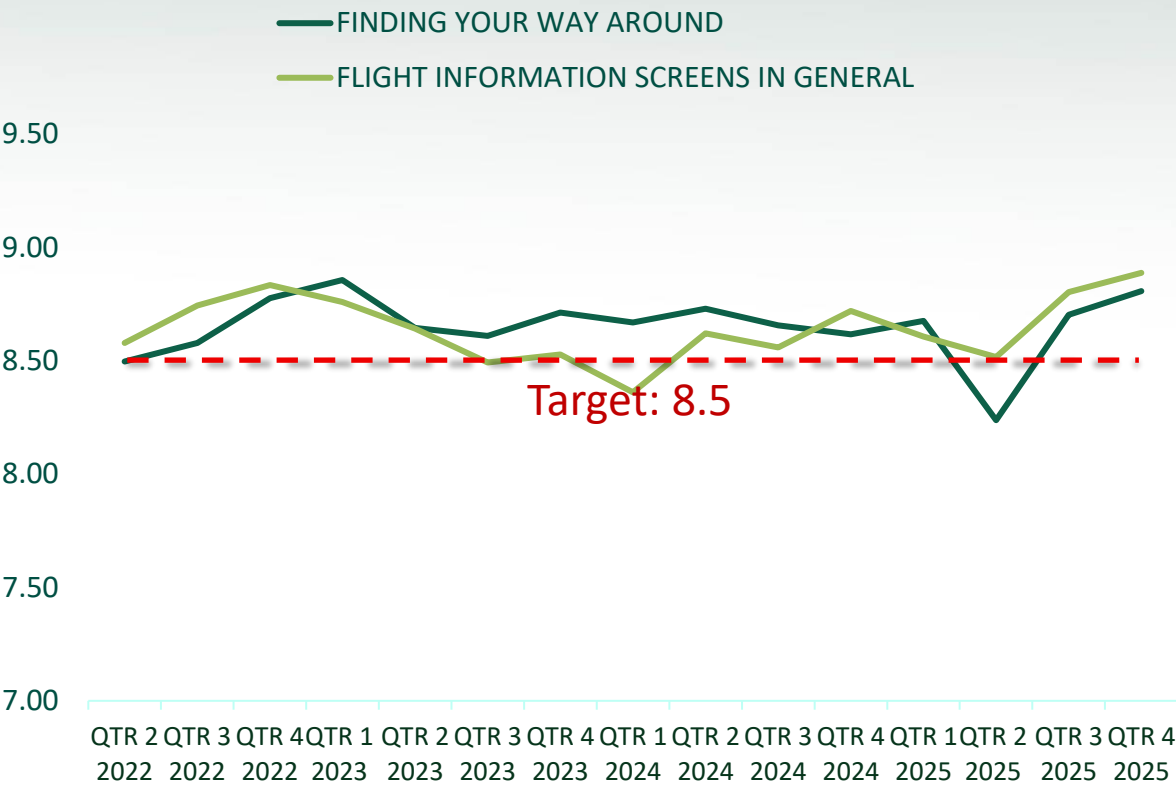
Charts present a subset of IAA scores to keep insights focused

Source, REDC, CSM Departures Data

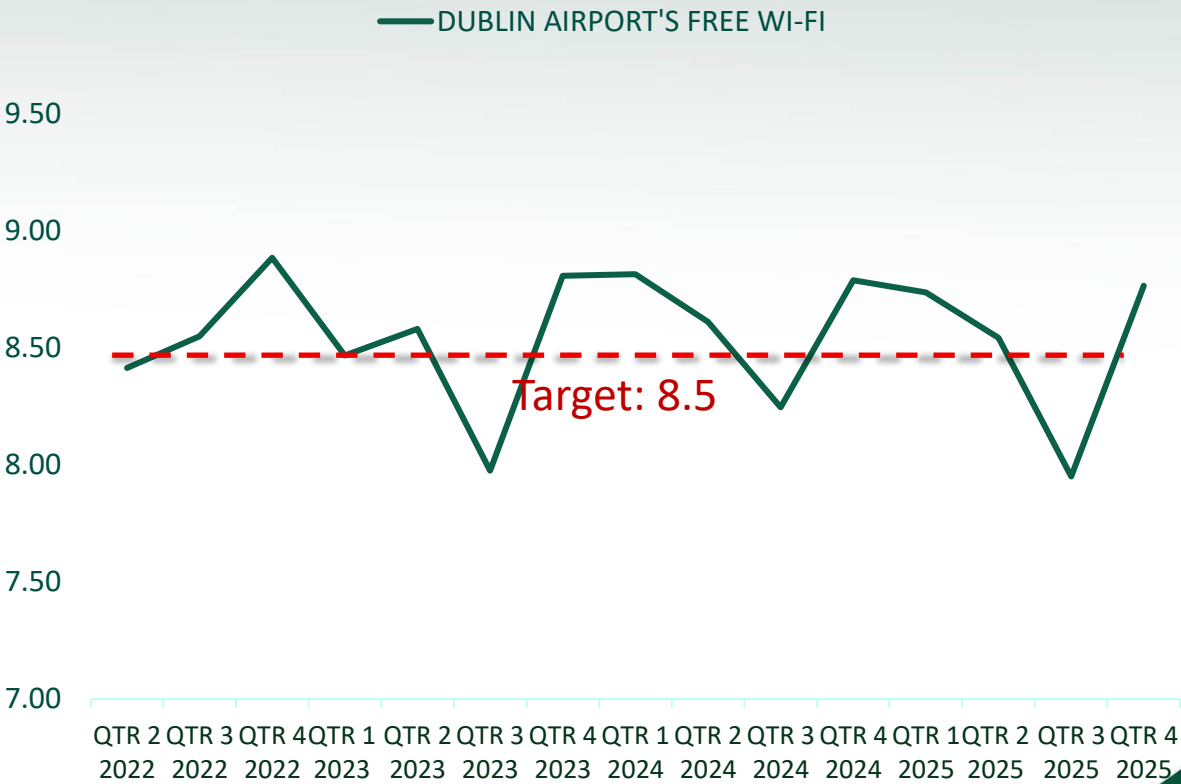
But at busier periods, we see more volatility in scores for business pax, particularly Wi-Fi

BUSINESS PAX

MOVEMENT



Wi-Fi



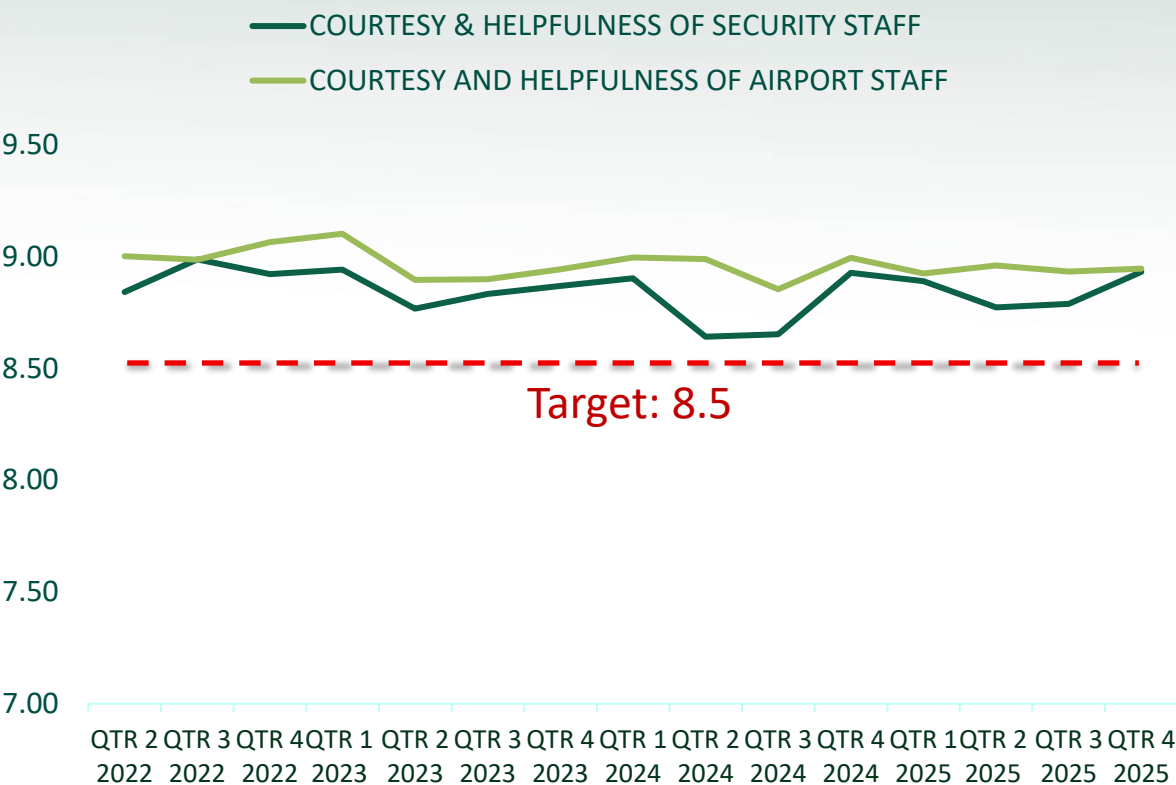
Charts present a subset of IAA scores to keep insights focused

Source, REDC, CSM [Departures](#) Data

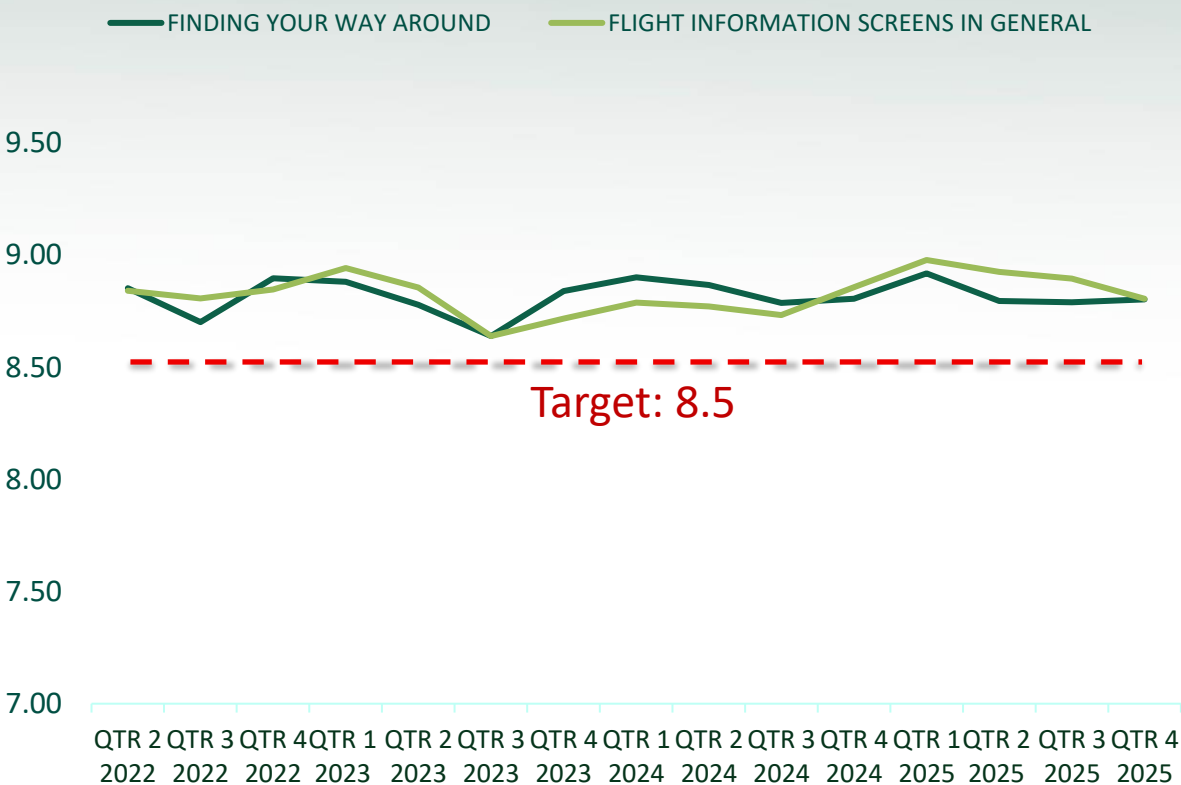
Those travelling for leisure and generally very satisfied. We manage to maintain high standards of movement, even in busy summer months.

LEISURE PAX

STAFF



MOVEMENT



Charts present a subset of IAA scores to keep insights focused

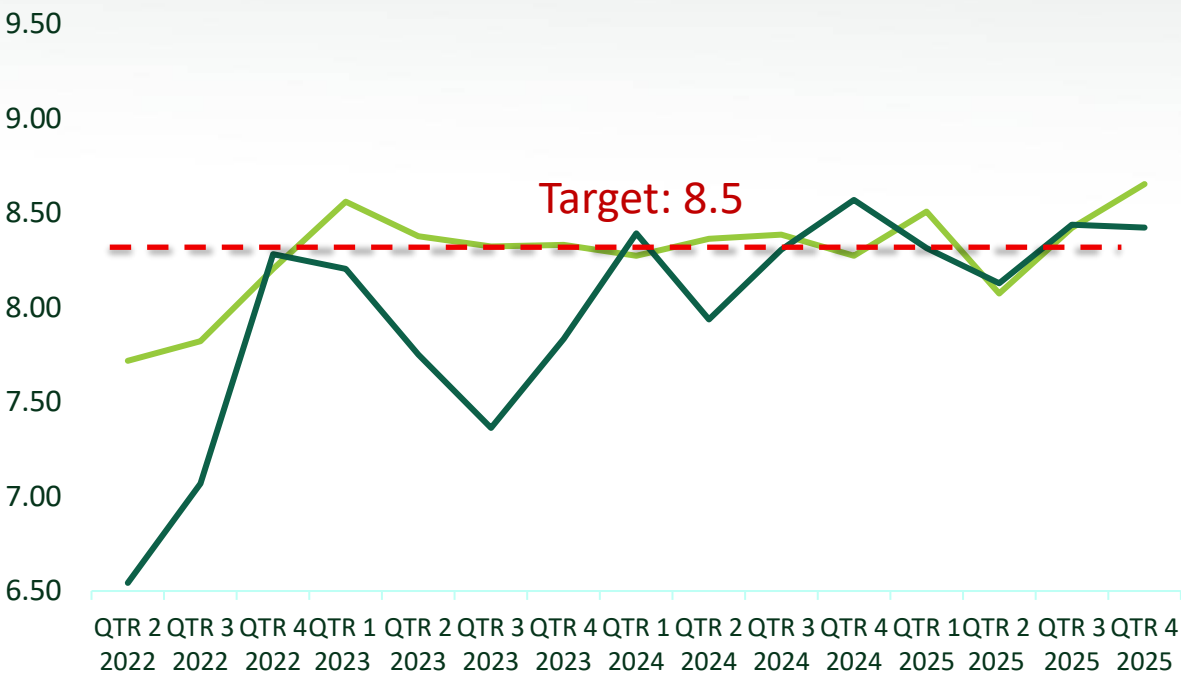
Source, REDC, CSM Departures Data

Our cleanliness scores are gaining considerably amongst both groups, but there is volatility during busy Summer months

BUSINESS PAX

CLEANLINESS

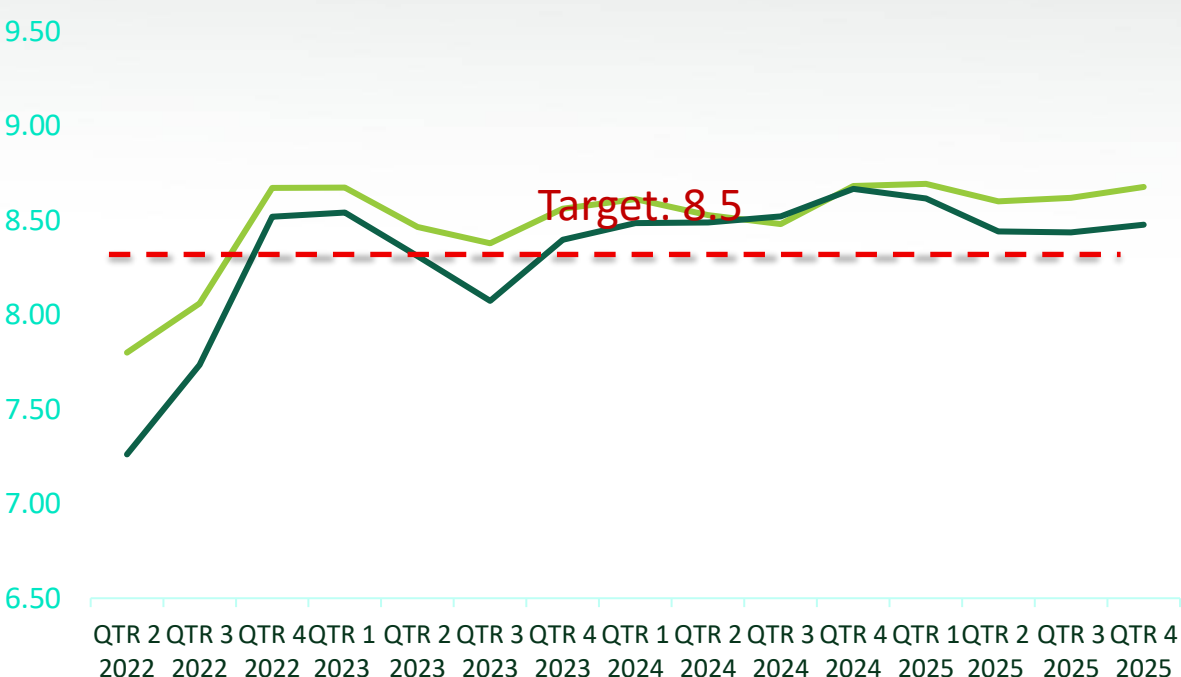
- OVERALL CLEANLINESS OF THE AIRPORT TERMINAL
- CLEANLINESS OF TOILETS/WASHROOMS



LEISURE PAX

CLEANLINESS

- OVERALL CLEANLINESS OF THE AIRPORT TERMINAL
- CLEANLINESS OF TOILETS/WASHROOMS



Charts present a subset of IAA scores to keep insights focused

Source, REDC, CSM Departures Data & Arrivals On My Way Data

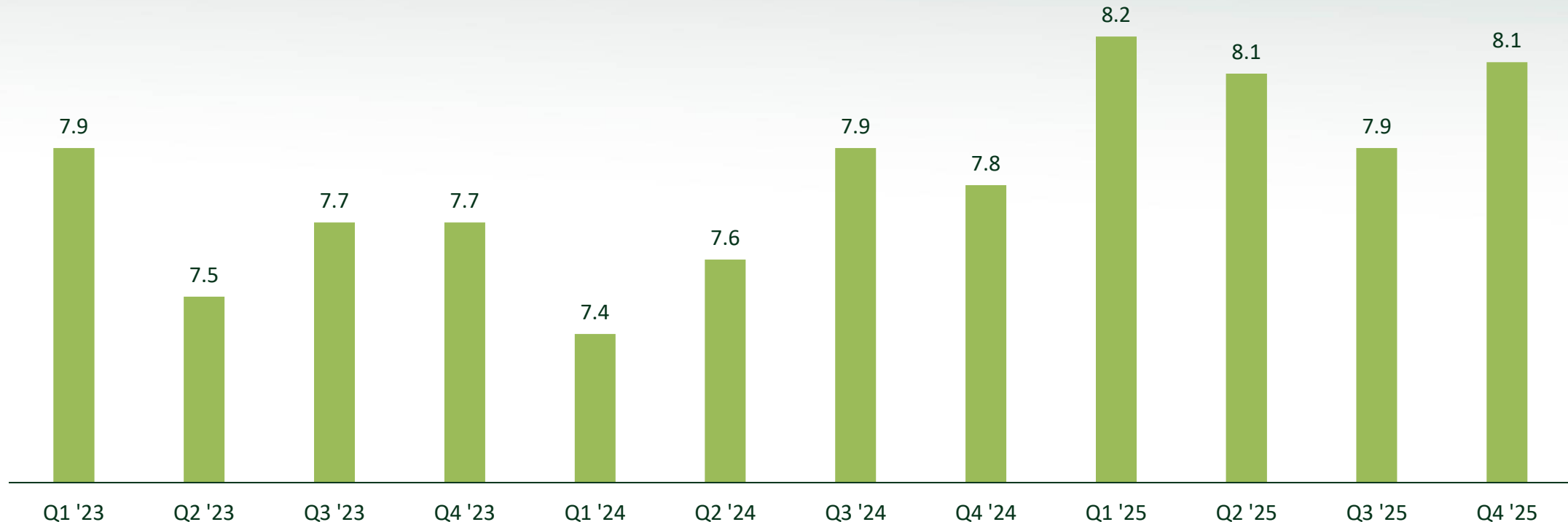
Dublin Airport's work on improving subjective metric scores

Overview of actions and remedial changes applied since 2022 based on passenger surveys and feedback received.

The 'Ground transport information on arrival' metric has been a key focus of attention for Dublin Airport since its introduction in 2023

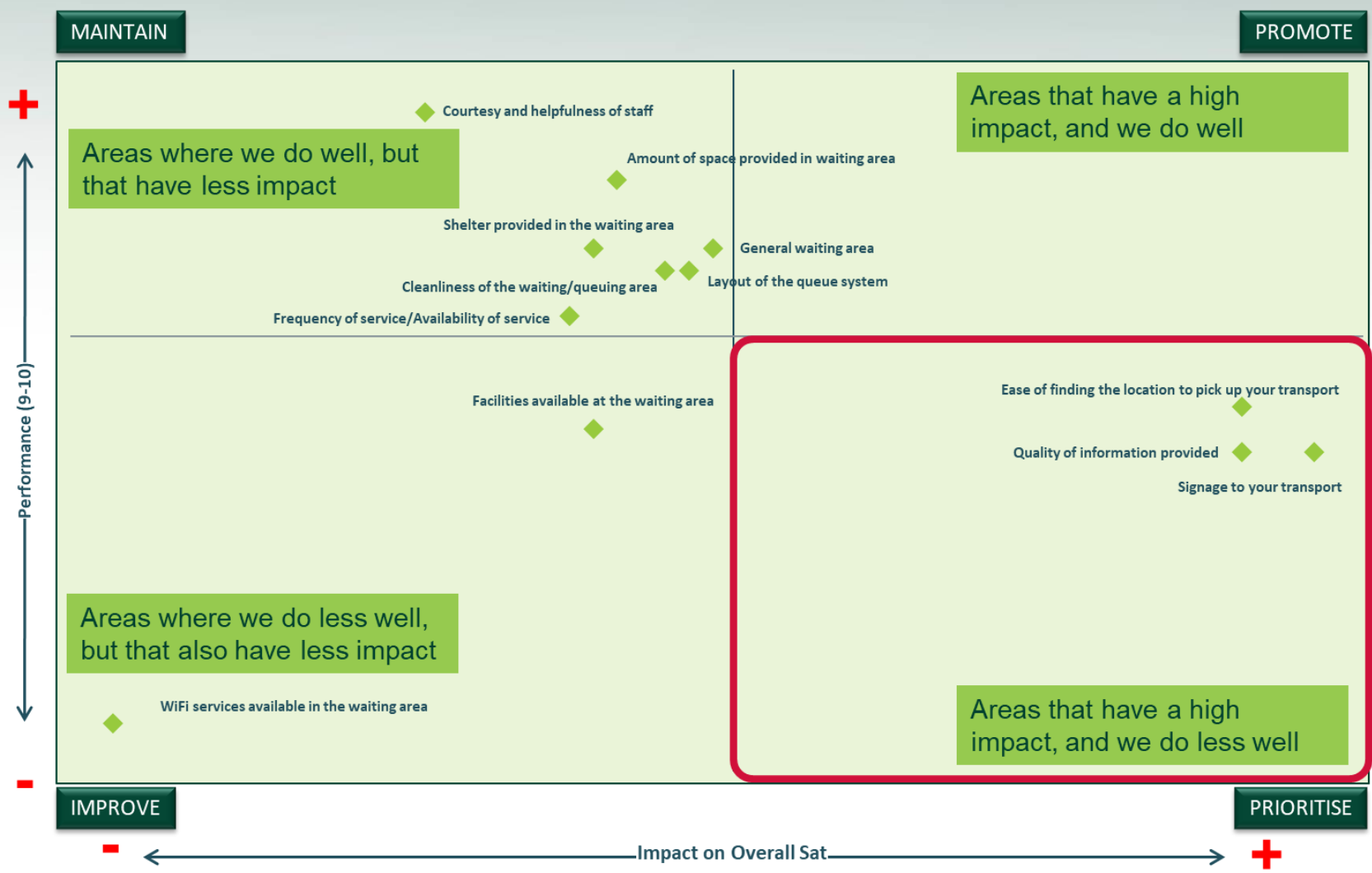
Information provided by Dublin Airport on arrival about public transport*

Target: 8.5



* The methodology used to gather data on 'Ground transport information on arrival' differs from all other SQM metrics. Face-to-face and online surveys are utilised to capture this metric

Working with RedC, Dublin Airport have identified the areas of most importance to passengers when seeking 'Ground transport information on arrival'





Standards and Improvements Public Transport Information

Since the introduction of the IAA Service Quality Measure—"How satisfied are you with the information provided by Dublin Airport on arrival about public transport?"—the Standards and Improvements team have implemented a series of targeted initiatives across both Terminal and Landside areas. These efforts have significantly enhanced the quality of ground transport facilities and improved the clarity, accessibility, and visibility of public transport information provided to arriving passengers.

Completed in 2024

Zonal wayfinding was introduced along key walking routes to make navigation clearer and more intuitive.

A light refurbishment of the T1 Atrium gave a more modern look and feel to the area



Completed Early 2025

Alignment of the campus wayfinding system to ensure consistent navigation across all areas

Rollout of smart bins to improve cleanliness

Installation of Transport Information Points in the baggage hall and T1 Atrium to give passengers clearer onward-travel guidance



Completed late 2025

New colour-coded furniture now supports the wayfinding system, making zones easier to identify and navigate

Upgraded maps have been deployed across the Terminal and Campus to improve navigation.

T2 has seen kerbside busing and taxi rank enhancements, along with new seating areas for passenger comfort. T1 busing zones have been upgraded to enhance passenger flow, with wayfinding now aligned to the zonal colour scheme



Proposed Initiatives for 2026

We plan to start a refurbishment and replacement programme for bus shelters across Busing Zones 8-15, improving comfort and weather protection for passengers.

New Ground Transport and onward-journey interactive screens will be introduced to assist with journey planning

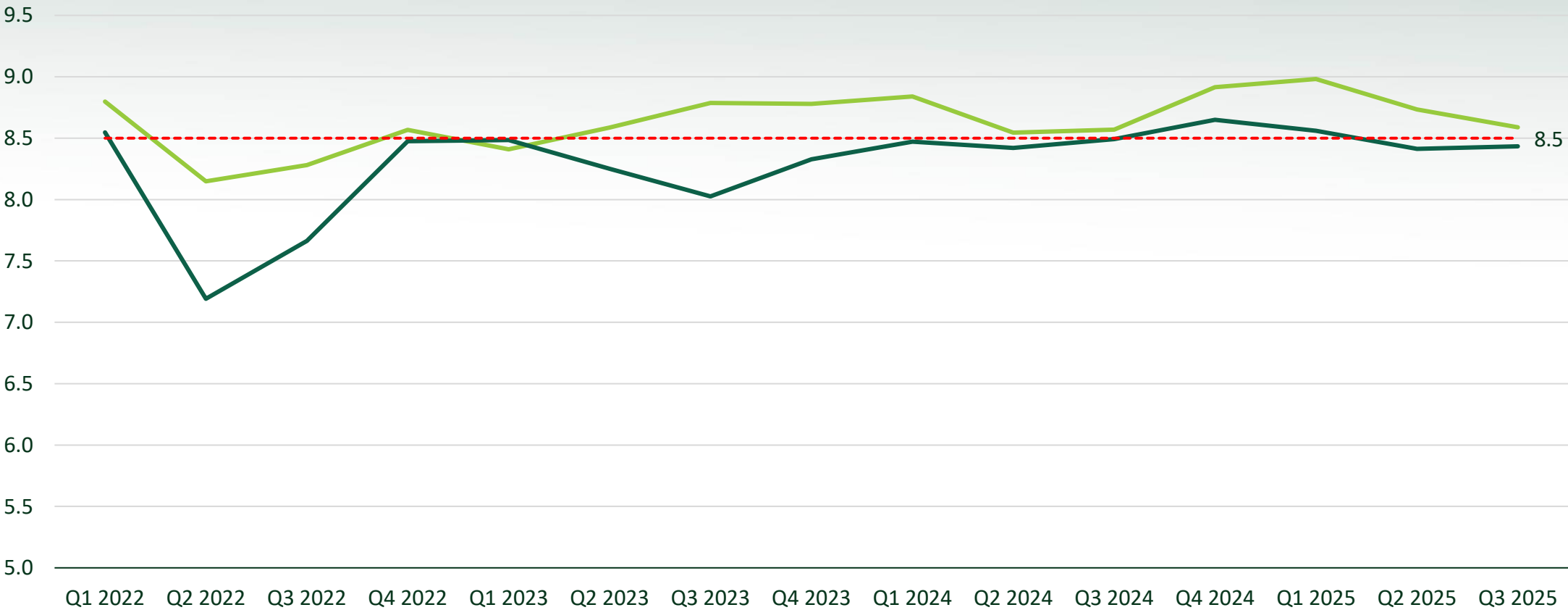
The Coach Park shelter will be upgraded to provide a more consistent and reliable experience for passengers using coach and shuttle services.



Dublin Airport teams work hard to maintain the ‘Cleanliness of Washrooms’ score throughout the year

Cleanliness of Washrooms

Arrivals Departures Target



Source, RedC, CSM Research

Our Cleaning and Asset Management teams have implemented a number of initiatives to maintain our 'Cleanliness of Washroom' score

This includes, but are not limited to:

Team improvements:

- Increased focus on Cleaning teams utilising the correct equipment and ensuring availability.
- Refresher training for all Cleaning team.
- Utilisation of a 'Specialised Cleaning Team' during peak times.
- Introduced an improved schedule to ensure that every washroom was placed on a proper timeline to receive a deep-clean in terms of foaming and de-scaling etc..
- Increased passenger numbers (+8million since 2022) means more pressure on facilities, however daa continues to invest time and money into maintaining satisfaction.



Asset Improvement

- Last year we increased our washroom audits and took immediate corrective action.
- Introduced trough sinks into selected washrooms in T1 to help prevent unsightly water marks on the washroom floors.
- Replaced all damaged/heavily stained toilet seats across both terminals.
- Installed 'Happy or Not' machine apps onto the Cleaning Team Leads mobile phone so that they can access live feedback from passengers re asset/cleanliness issues.
- Coordinated with Asset Management and the Specialised Cleaning Team to deep clean or replace all washroom ceiling tiles.
- Introduced a new scent system into both terminals for every washroom.
- Washroom signage in both terminals improved.

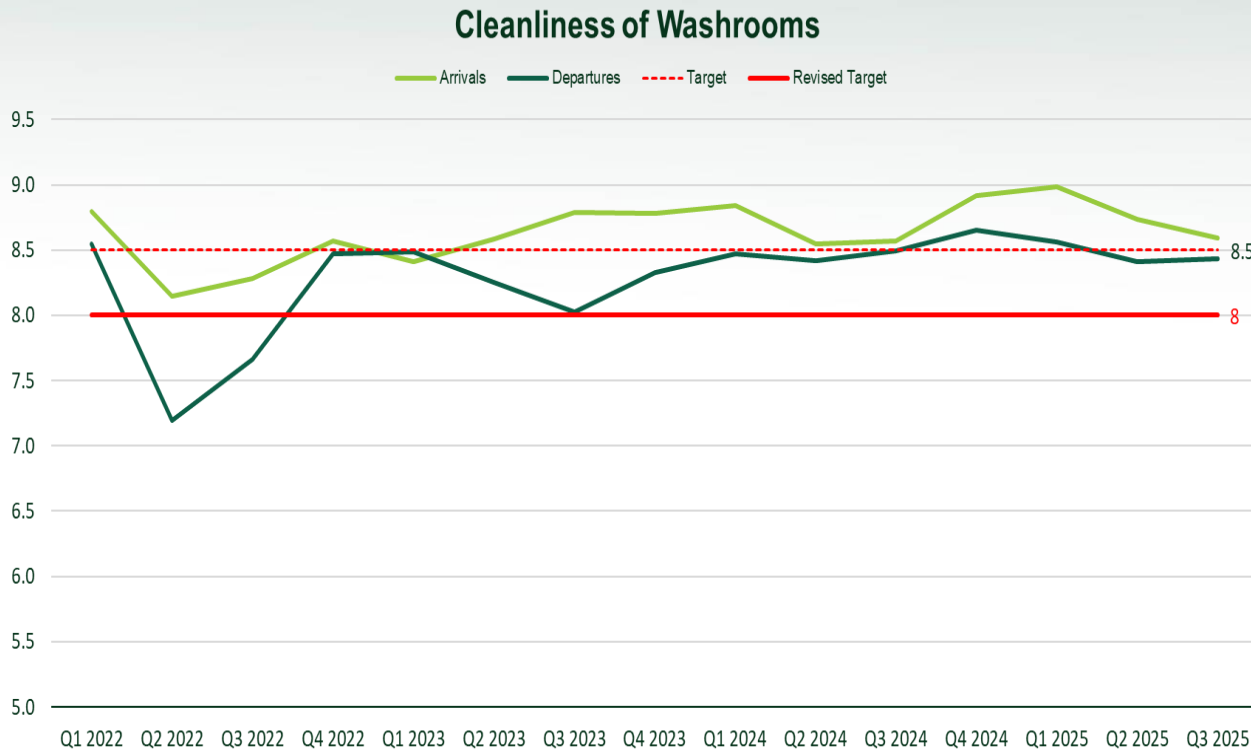
Seomraí níos áine bhreise le fáil ag geata 410

Additional washrooms available at Gate 410

Amendments proposed on subjective metric scores

Changes we recommend applying to the subjective metrics going forward,
based on experience and evidence

Dublin Airport would like to request the reduction of the target for Cleanliness of Washroom



Reduction of target from 8.5 to 8.0

- The only metric which is heavily influenced by fellow passengers (those who use the facility before you). We have to allow for this in the target.
- When passenger score above 8.0 the cleanliness is already perceived as **'very good'**.
- Washroom cleanliness has a target of 8.0 until 2022, when the pandemic caused a surge in concern around cleanliness.
- Sustaining delivery at 8.5 has proven to be inherently volatile, even with **consistent operational focus**.
- An **8.0 target maintains a high standard of cleanliness** while allowing for variation in passenger perception and peak-period demand.
- Additionally, would it be possible to set different targets for each terminal?

Ground transport information on arrival metric is a subjective measure we would like to reduce also

As previously discussed, while Dublin Airport is failing to reach our target for this metric, we have made significant investment in this area and are seeing an improvement in satisfaction levels of passenger.

However, we would appreciate if consideration could be made to the following points:

- **Methodology:** Currently this metric utilises a different methodology for collection vs all other SQM metrics. Both face-to-face and online survey collection employed for this metric vs face-to-face only approach for all other metrics. Would it be possible for us to trial face-to-face only collection for the Ground transport information on arrival metric.
- **Pre-Booked Taxis:** these are included in the scope of Public transport. It could be argued that if a product is pre-booked then, by definition, it shouldn't be classified as Public Transport, as it is not available to all. Could this be removed?
- **Service Providers:** We believe that there needs to be greater emphasis on the Public Transport Service Provider also playing a role in providing information to passengers regarding their services.
- **Target Reduction:** While Dublin Airport continues to work diligently to improve scores in this area, we would like the target **reduced to 8.3**, as improvement multiple improvements have been made.



How passengers actually score airports:

- Subjective SQMs reflect perception, not transactions,
- Score plateau as performance improves causing diminishing returns,
- Cultural and behavioural bias limits '10/10' scoring.



Implications of raising targets:

- Disproportional investment required for marginal gains,
- Long lead times (years, not quarters) to shift perception by even 0.1,
- Risk of target inflation without passenger benefit,
- Penalises a mature, high-performing airport.

Subjective SQM targets should reflect behavioural ceilings and should not be escalated in the same way as operational KPIs

Dublin Airport Objective Metrics

Measuring performance against actual data

Security Operations

The role of Aviation security is to prevent acts of unlawful interference with civil aviation (our primary Goal)

We aim to avoid delays at security, However passenger security and safety is our Primary objective.

Security Queue Time Targets by the IAA

70% of passengers < 20 minutes
100% of passengers < 30 minutes

Regulatory Compliance

Requirements Under

1. ICAO Annex 17
2. EU Regulation
3. Irish Legislation

Subject to continuous inspections. Failure to maintain our focus on compliance will have 2 outcomes:

1. Failure to focus on compliance can result in an Article 15 of Regulation (EC) No 300/2008, by the IAA. This can have an associated rectification cost and cause reputational damage.
2. If a prohibited article makes its way onto an aircraft This puts everyone at risk. We've seen suspected dry-run attempts, and we detect dangerous goods and prohibited items on a daily basis.

Security Screening is a Central Node

Security Screening has **significant positive covariances** with:

Food & Beverage | Shopping Facilities |
Wayfinding Signage | Terminal Comfort |
Terminal Facilities | Departure | Transfer.

This illustrates that **Security Screening is interconnected with nearly all other service areas**, making it a critical linchpin.

Smoothing this touchpoint has significant halo effects throughout all other areas of the Passenger Experience.

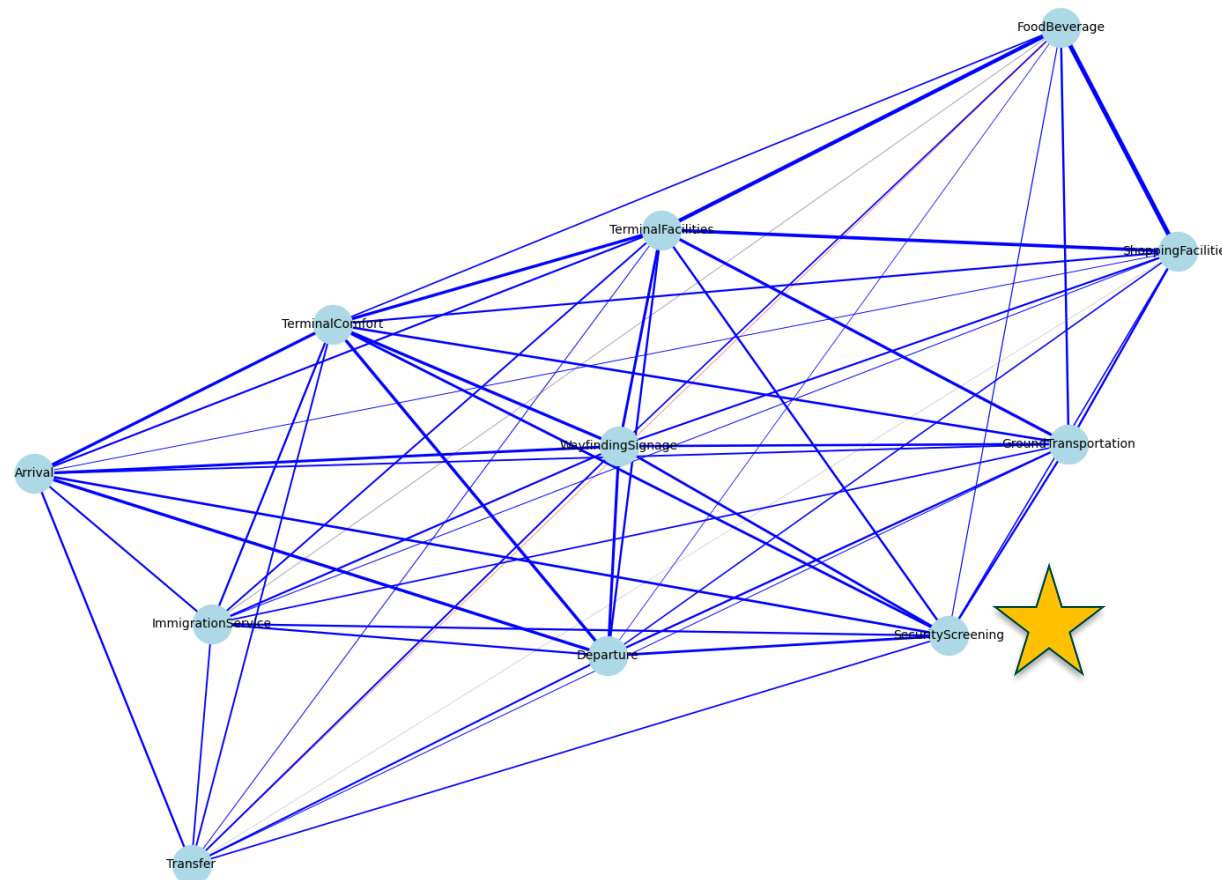
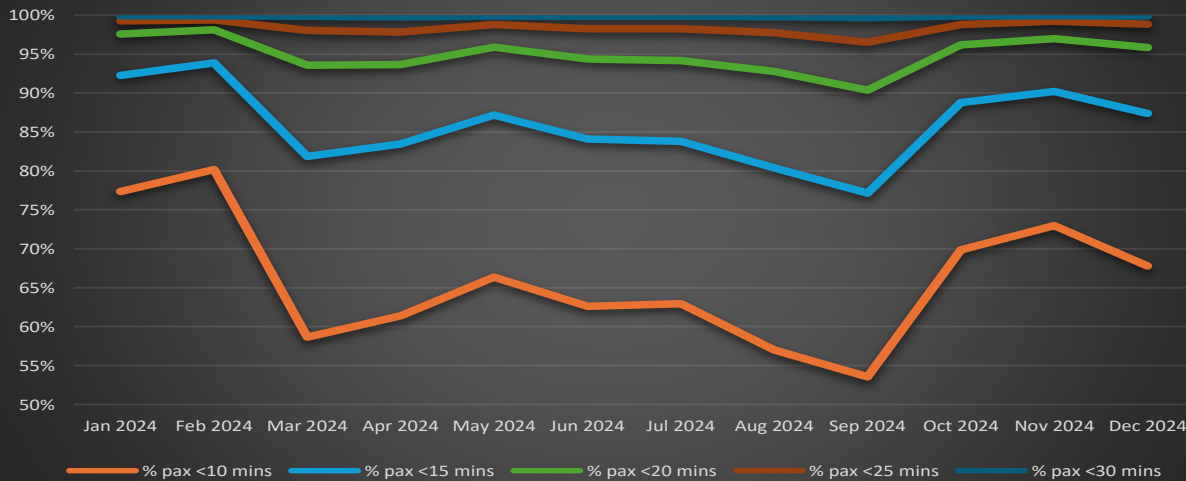


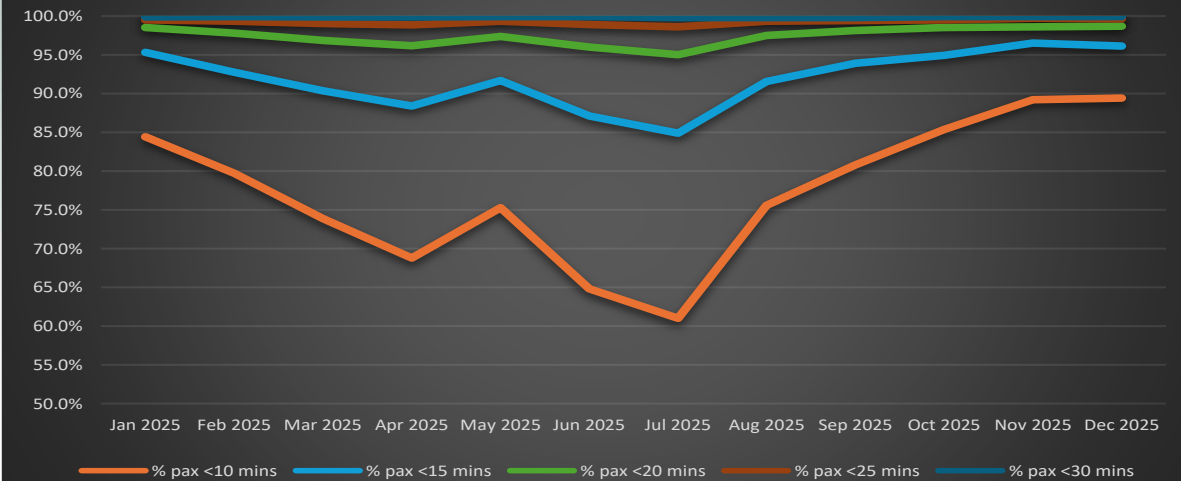
Fig 1: Network diagram of covariance relationships between service factors.
The thicker the line, the stronger the relationship.

Current Q Time Analysis

2024 PAX Q times experience



2025 PAX Q times experience



Technology Upgrades

The upgrade and investment to CT technology means passengers no longer need to remove liquids and laptops from carry-on baggage. This has been completed across both terminals and has had an overwhelmingly positive impact on our passenger experience.

Investment in Staff

In 2025 we made a significant resourcing investment. This enabled us to provide more consistent wait times. Security queues became more predictable, with peak-hour surges generally shorter and less volatile than in previous years. 2025 was the first year since COVID where we had 0 breaches of our 100% < 30 minute SLA, which would not have been possible without this investment.

Better prediction tools and transparency

A new short-term forecasting model was introduced to ingest real-time booking loads which helped to enhance our predictive models, giving passengers clearer expectations for future wait times and reducing 'security anxiety' around peak-hour congestion. We have also recently created live dashboards with lane-specific data, highlighting those that are underperforming (not enough trays, lane faults etc.)

What we currently measure...

FEGP



Target

99%

Actual

99.86%

Baggage Inbound Availability



No request was received from handling agent or airline for use of an alternative belt.

PASS/FAIL

AVDGS



Target

99%

Actual

99.84%

Baggage Outbound Availability



No request was received from handling agent or airline for use of an alternative belt.

PASS/FAIL

T2 Passenger Facing Lifts & Escalators



Target

99%

Actual

99.62%

Self-Service Kiosk Availability



Target

99%

Actual

99.38%

Proposals

- Exemptions: Current exemptions lack sufficient detail in some areas, and we believe a review is required.
- Targets: No changes proposed – moving check-in areas within 30 minutes would create significant safety risks.
- Methodology: No changes recommended at this time.

Dublin Airport has consistently achieved the PRM targets

Metric	Departing with Assistance	Price cap at risk
Passenger C		
Additional Assistance	Y	Annual -€0.01
Helpfulness of security staff	Y	Quarterly -€0.01
Helpfulness of airport staff	Y	Quarterly -€0.01
Cleanliness of terminal	Y	Quarterly -€0.01
Overall satisfaction	Y	Quarterly -€0.01
Cleanliness of toilets	Y	Quarterly -€0.01
Departure gates	Y	Quarterly -€0.01
Ease of Movement	Y	Quarterly -€0.01
Passenger information		
Finding your way around	Y	Quarterly -€0.01
Flight information screens	Y	Quarterly -€0.01
Ground transport information on arrival		Quarterly -€0.01
Passenger facilities and services		
Facilities for Passengers who require additional assistance	Y	Quarterly -€0.01
Availability of trolleys	Y	Quarterly -€0.01
Satisfaction with Wi-Fi	Y	Quarterly -€0.01
Sense of safety for my health	Y	None

Facilities for Passengers who require additional assistance	9.0	9.5	Quarterly €0.01
---	-----	-----	-----------------

Table 13.2: Maximum wait time for assistance for 2023-2026

Draft Target	Pre-advised	Non pre-advised	Price cap at risk
If a passenger presents for assistance at an external point within the airport campus they should be assisted to the appropriate terminal reception point as follows: Breach if the percentage of passengers assisted from the terminal reception point is lower than the targets as follows:	98% within 10 min	98% within 20 min	Annually -€0.01
Breach if the percentage of passengers assisted from the terminal reception point is lower than the targets as follows:	95% within 15 min 98% within 20 min	95% within 20 min 98% within 30 min	
Breach if the percentage of passengers that are assisted from aircraft to terminal holding point onwards is lower than the targets as follows:	93% within 10 min 98% within 15 min	93% within 15 min 98% within 20 min	Annually -€0.01
Backstop Target			
Breach if the percentage of passengers assisted from the terminal reception point is lower than the targets as follows:	90% within 15 minutes 91% within 20 minutes	None	Annually -€0.02

Source: CAR.

PASS

Subjective

No penalties
Exceeded targets
2022-2025

PASS

Objective

No Breach

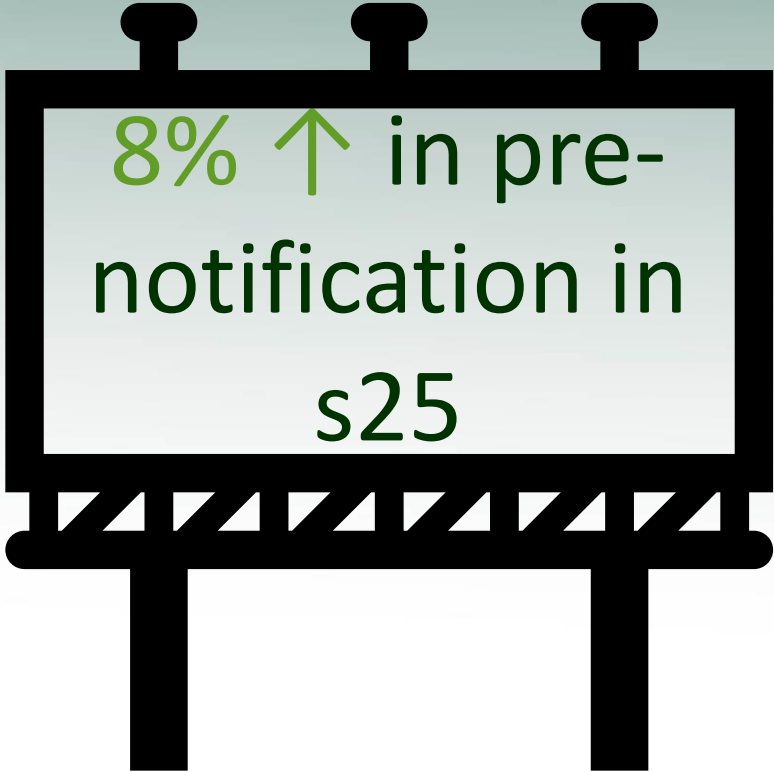
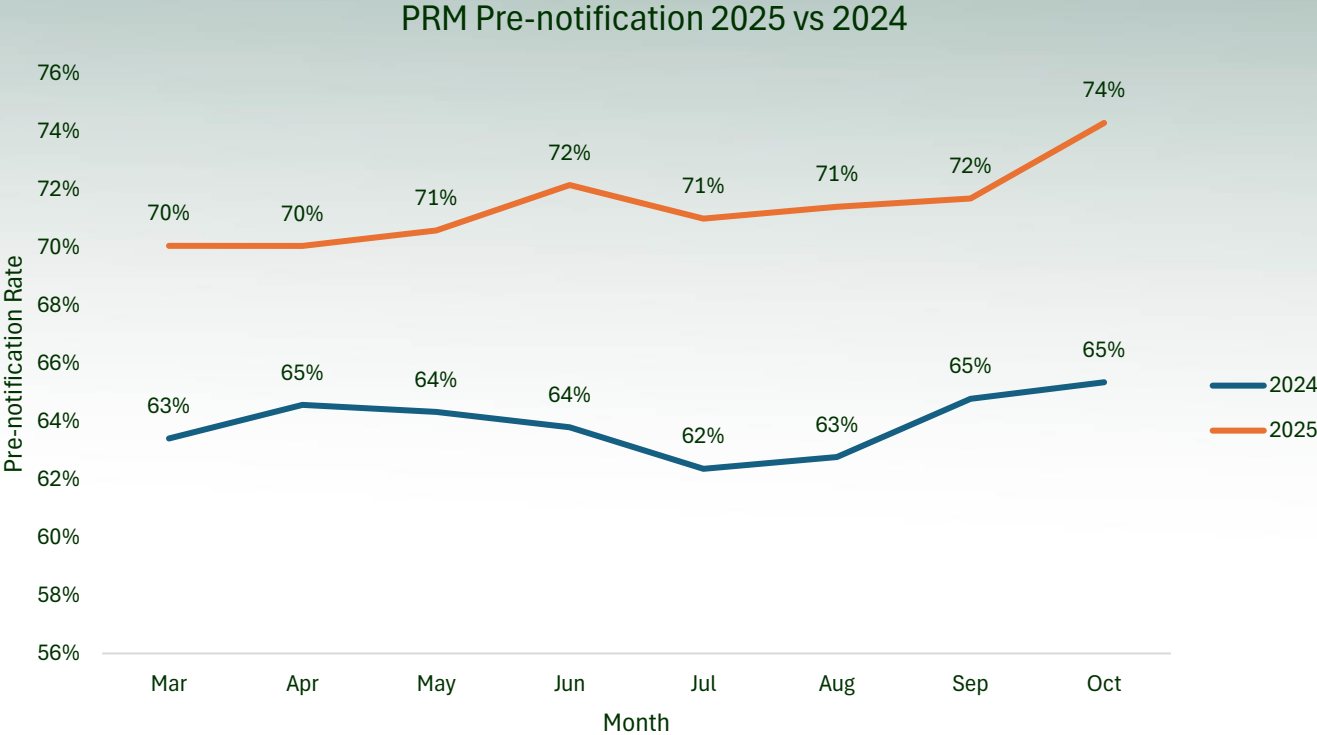
Dublin Airport consistently excelled with PRM satisfaction

2025						
CATEGORY	METRIC	Target	Bonus	2025	2024	2023
Passenger Care €0.07 max (penalty / bonus)	Overall satisfaction	8.5	9.3	9.0	8.9	8.9
	Courtesy and helpfulness of airport staff	8.5	9.3	9.3	9.4	9.2
	Courtesy and helpfulness of security staff	8.5	9.3	9.3	8.9	9.1
	Overall cleanliness of the airport terminal	8.5	9.2	8.9	8.8	8.8
	Cleanliness of washrooms	8.5	9.2	8.8	9.0	8.5
	Departure Gates	8.0	9.0	8.6	8.7	8.6
	Ease of Movement	8.0	9.0	8.5	8.8	8.7
Passenger Information €0.04 max (penalty / bonus)	Additional Assistance	9.0	9.5	9.4	9.5	9.3
	Finding your way around	8.5	9.0	8.9	9.2	8.9
	Flight information screens	8.5	9.0	8.8	9.0	8.7
Passenger Facilities & Service €0.04 max (penalty / bonus)	Information on public transport on Arrival	8.5	9.0			
	Availability of Baggage trolleys	8.5	9.0	*	*	*
	Satisfaction with free Wi-Fi	8.5	9.0	*	*	*
	Facilities for those requiring additional assistance	9.0	9.5	9.2	9.4	9.1



Overall satisfaction in 2025

Dublin Airport introduced pre-notification in 2025



Introduced pre-notification incentive

Airlines fixed data flow issues so PRMs that pre-notified flowed through to service provider

Made experience more seamless for PRMs

8% increase in pre-notification

The current PRM SQM regime is already quite stretching



Maintain current regime



Minor reduction in most scores in 25 vs 24 → challenge in maintaining high service quality as passenger volumes ↑



Already Exceeds ECAC Doc 30, Part I Guidelines



Have even more stretching SLA = further commitment to PRMs

Dublin Airport Capital Development Plan

Simon McGreevy
Head of Capital Planning



- ❑ Dublin Airport's aeronautical charges are regulated by the IAA
- ❑ Every five years the IAA seats a control on per passenger aeronautical charges
- ❑ The Regulatory Determination considers a number of interrelated building blocks
- ❑ Airport capital investment is a single input to the model
- ❑ While the overall investment proposal can amount to billions of euro, the impact on the price cap is less sensitive than other building blocks
- ❑ Historically, stakeholders have wide ranging views on how the airport should be developed. This feedback will shape the final proposal to be submitted to IAA in February 2026





Government Policy



Develop new routes and services

Ensure a high level of competition

Maximise connectivity to the world

Maximise scale and usage of US CBP

Achieve Net Zero Objectives

Business Objectives



Safe, secure and sustainable

Capacity enablement and future proofing

Operational efficiency and resilience

Enhanced service delivery

Revenue generation

Customer Requirements



Facilitate growth

Operational efficiency

Co-location and preferred facilities

Enhanced guest experience / product

Low airport charges

National Aviation Policy (NAP) 2015



Enhancing connectivity, ensuring safe, secure, and competitive access for business, tourism, and consumers

Fostering aviation enterprise, supporting job creation and positioning Ireland as a global leader in aviation

Maximising economic contribution, leveraging aviation to boost national economic growth

Climate Action Plan 2024 and Low Carbon Development Act 2021



Legally binding commitment for Ireland to achieve net-zero greenhouse gas emissions by 2050

Reduction and replacement of fossil fuels sources by renewable energy solutions

Renewable energy solutions for heating and cooling buildings

Infrastructure to decarbonise ramp ground operations to service aircraft campus wide

Service Quality Metrics (SQMs)



The Irish Aviation Authority (IAA) employs a range of quality metrics to assess and enhance the service standards at Dublin Airport

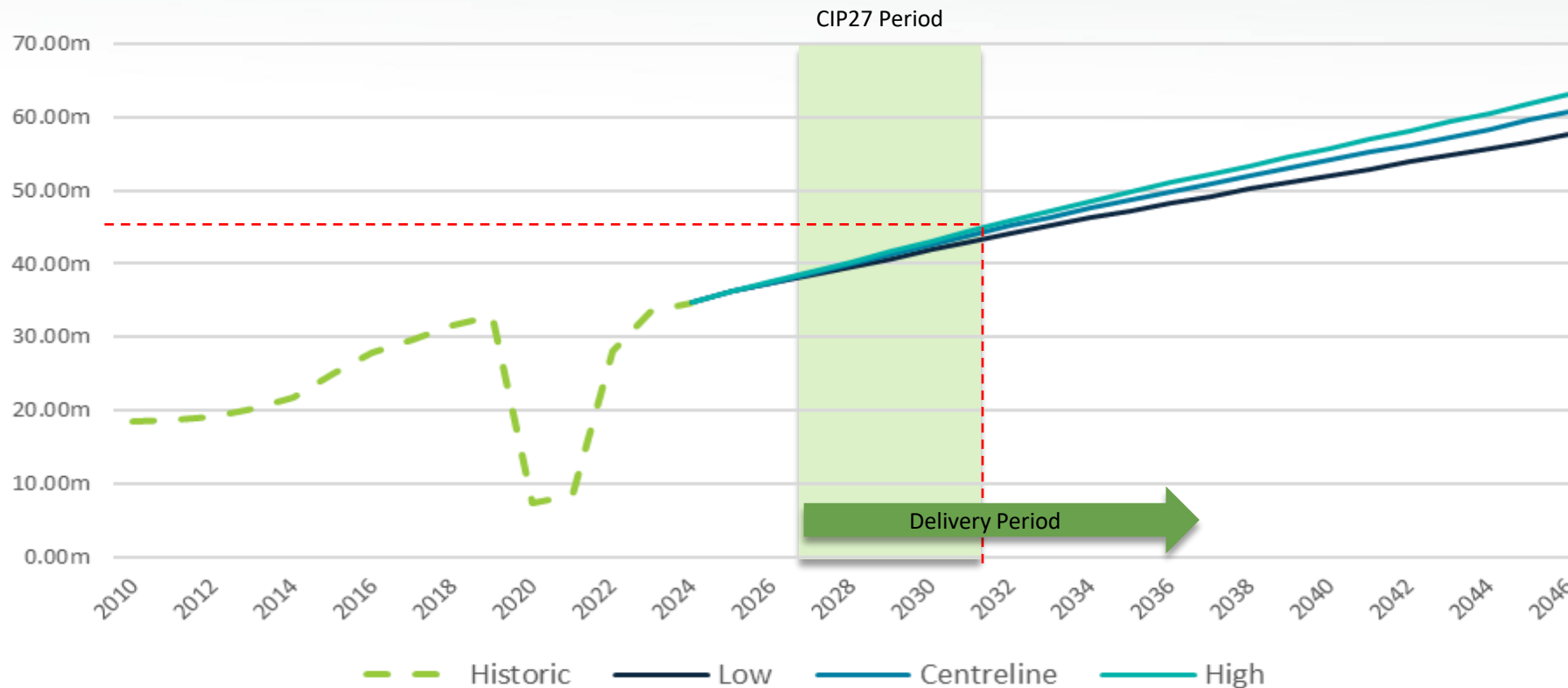
Requirement to provide sufficient processing capacity to minimise delays

Requirement to minimise down time of essential services

Requirement to maintain good passenger satisfaction through enhanced facilities

CIP27 Sizing For Growth

- CIP27 primarily focuses on enhancing the passenger experience while optimising existing capacity, stress-tested up to 45 mppa.
- Larger terminal and pier projects have been designed to future-proof capacity, which will be augmented by additional projects in future CIPs, working towards a balanced airport capacity beyond 45 mppa.



Growth Between 36m and 45mppa

Design Day Summary



126k

Passengers Per Day +25%

157k



7.0k

US Preclearance Passengers Per day +30%

9.1k



8.2k

Transfer Passengers Per Day +17%

9.6k



805

Max Aircraft Movements Per Day +23%

987

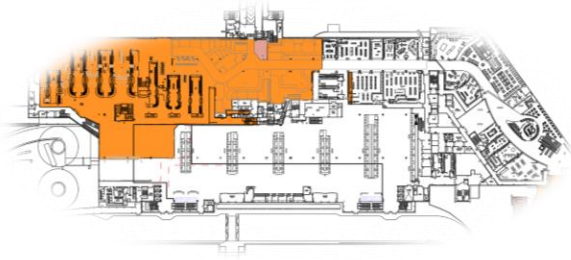
Annual Passenger Capacity



Piers, Gates & Contact Stands

40.0

- Significant deficit in contact stand capacity, specifically CBP enabled and widebody, bridge served stands
- Increased towing and bussing in the short-medium term



Terminals

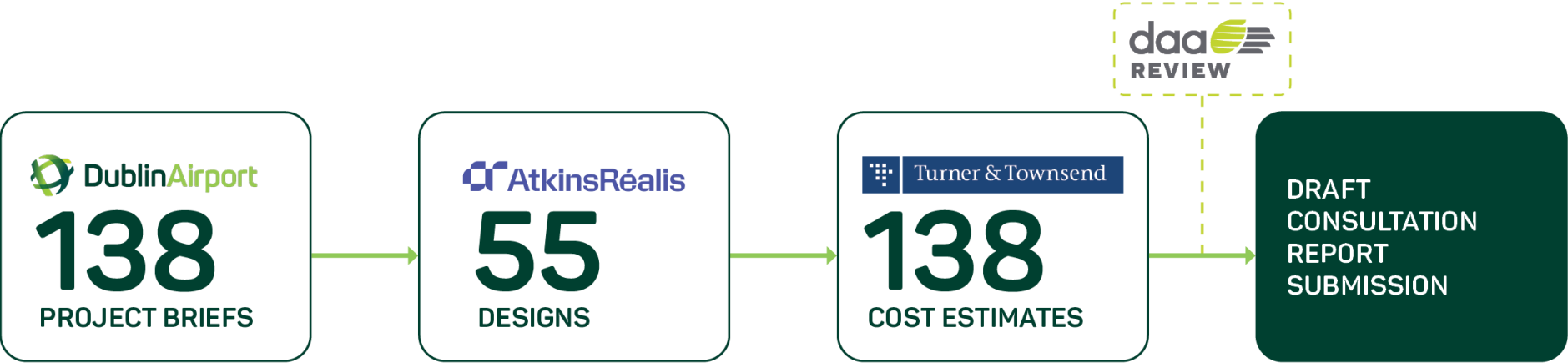
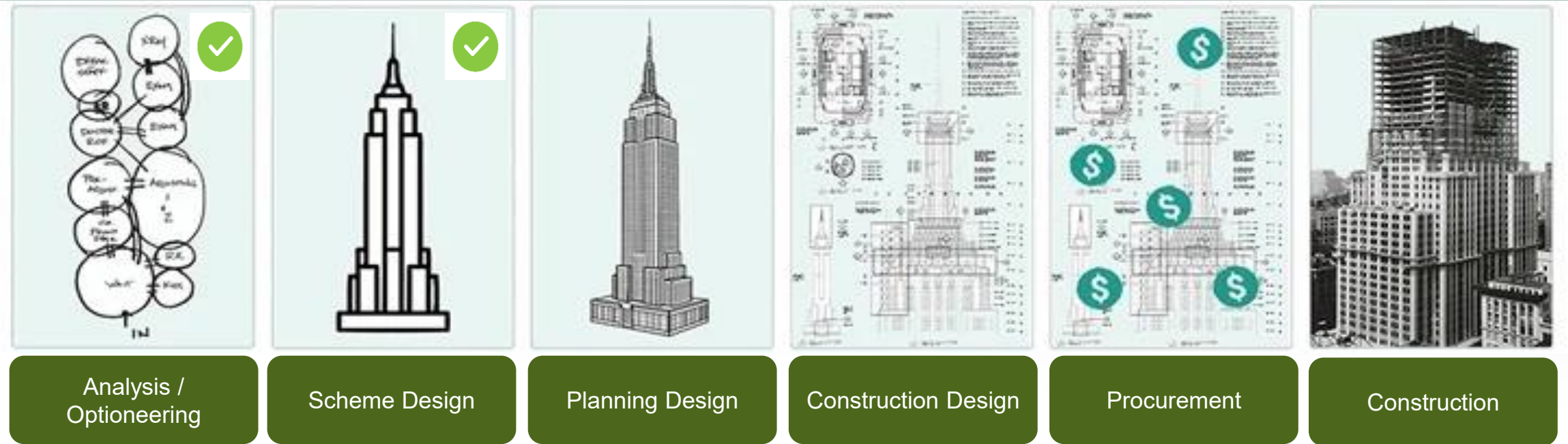
With tactical modifications to various processors across both existing terminals

45-50*



Runway System & Airfield

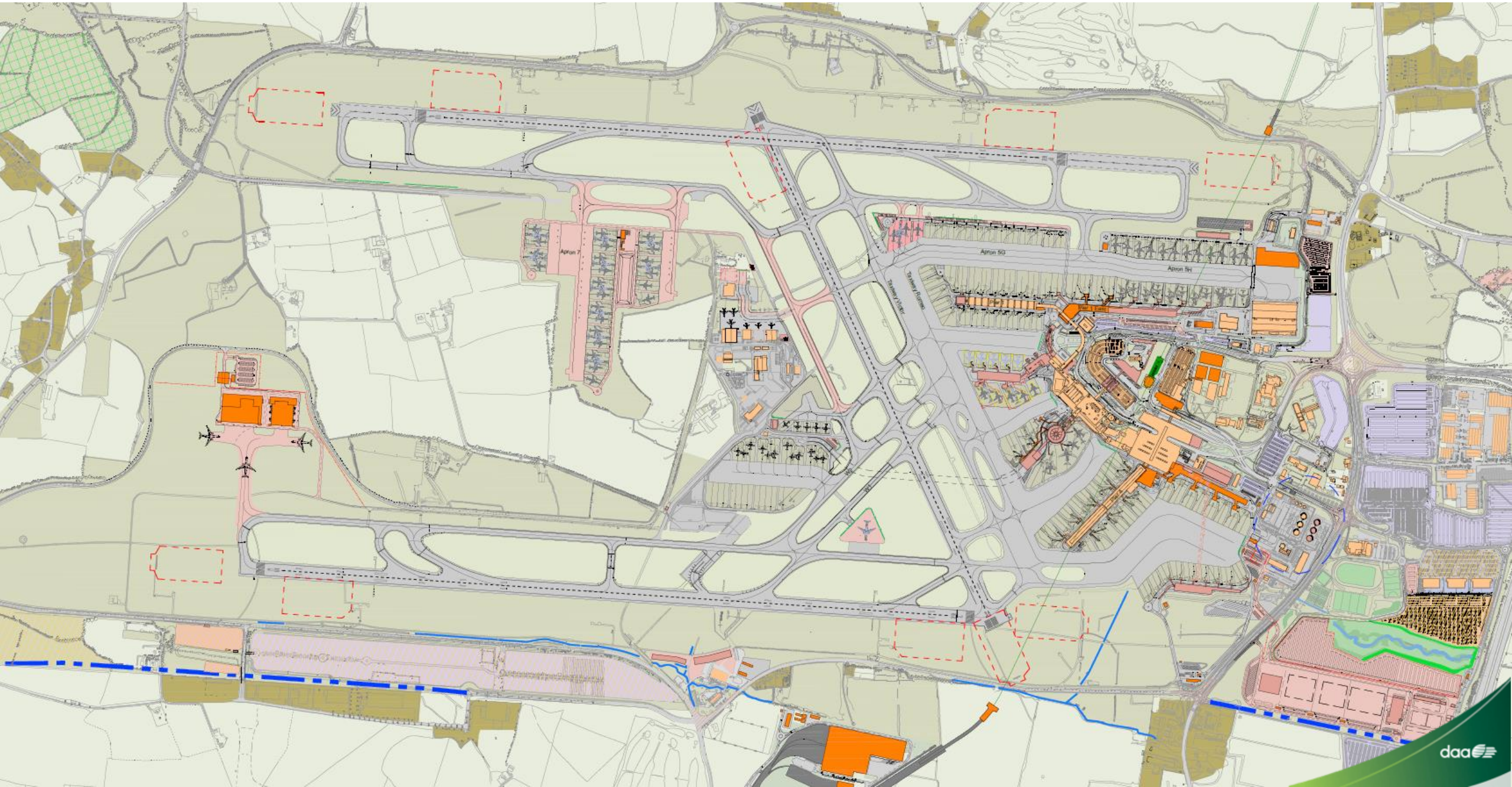
60+



Dublin Airport Capital Development Plan: Overarching Development Plan

Simon McGreevy
Head of Capital Planning

Overarching Development Plan



Overarching Development Plan

East Lands

Primarily focuses on development to the east of the R132 and the main road network accessing the airport campus from the M1



Sustainably enhance the land for non-airfield and commercial purposes.



Facilitate Airport Development through the relocation of the existing Cargo Warehouses.



Upgrade of campus access road intersections to alleviate bottlenecks and prioritise buses.



Provide sufficient parking for passengers, staff, and car rental.



Improve the biodiversity of existing natural habitats and safeguard recorded structures.



Tackle flooding and surface water management challenges.

Terminal 1

Comprises projects specifically designed to enhance Terminal 1 and its associated Pier infrastructure



Provide infrastructure to ensure safe and secure operations.



Flexible, sustainable, and balanced enhancements to meet projected demand through the new regulatory period.



Deliver sustainable new & upgraded piers/ stands supporting current & long-term growth.



Enhance public transport facilities to encourage bus usage in advance of Metro.



Ensure dependable continuity of operations through targeted asset replacement and upgrades.



Provide the necessary infrastructure to facilitate commercial opportunities.

Terminal 2

Comprises projects specifically designed to enhance Terminal 2 and its associated Pier infrastructure including the South Apron Hub



Provide infrastructure to ensure safe and secure operations.



Flexible, sustainable, and balanced enhancements to meet projected demand through the new regulatory period.



Deliver sustainable new & upgraded piers/ stands supporting current & long-term growth.



Focused on optimised transfer and US preclearance processes and an enhanced passenger experience.



Ensure dependable continuity of operations through targeted asset replacement and upgrades.



Provide the necessary infrastructure to facilitate commercial opportunities.



West Lands

Projects located to the west of Runway 16/34 and primarily airfield related



Provide infrastructure and enhancements to ensure safe, secure and efficient airfield operations.



Deliver sustainable and balanced enhancements to the existing West Apron.



Ensure dependable continuity of operations through targeted asset replacement and upgrades.



Provide the necessary infrastructure to facilitate commercial opportunities.

Overarching Development Plan

Campus

Addresses overarching requirements primarily related to major sustainability and utilities initiatives



Provide a backbone of upgraded and expanded sustainable and efficient utility and services infrastructure to support existing and future development.



Provide a framework for the treatment of legacy environmental impacts.



Provide initiatives aiming to regenerate and mitigate lost biodiversity and natural habits impacted by new and future development.



Implement focused initiatives to enhance passenger and staff mobility.

CGI Video

Dublin Airport Capital Development Plan

Anchor Passenger Focused Projects

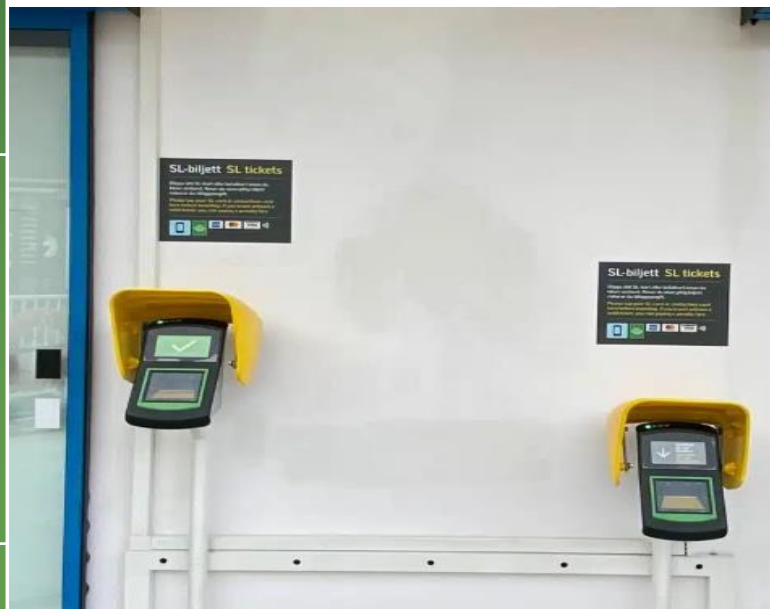
Name	Mobility & Accessibility
Number	27.01.04
Envelope	Sustainability
Status	New Project
Problem	Dublin Airport needs to provide accessibly facilities and services for passengers and remove barriers to travel
Options	Investigated options to improve mobility & accessibility
Solution	Upgrade IT/digital offerings Replacement of road / flooring surfaces & Accessibility Enhancements
Driver	EU Accessibility Act, IA commitments



Examples of tactile pavement at Belfast Central



Examples of Accessible Check In Desk

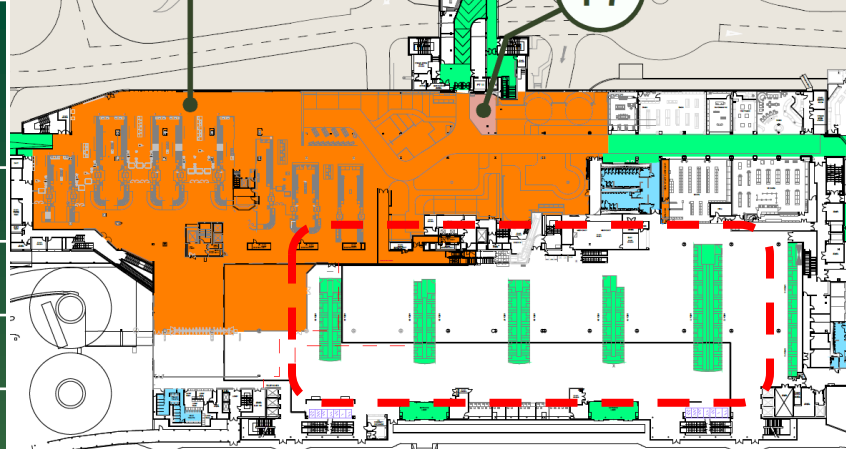


Examples of Accessible payment machines



Wheelchair accessible service desks

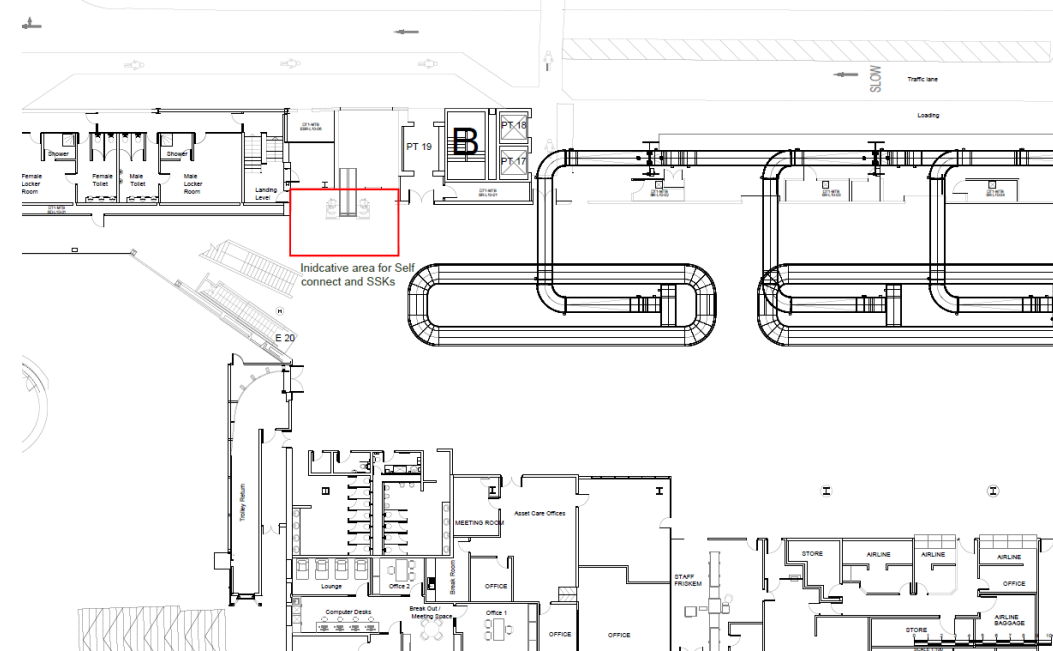
Name	T1 Check-in Optimisation and Refurbishment
Number	27.02.17
Envelope	Airport Development
Status	New Project
Problem	Check-in desks and bag collector systems beyond anticipated asset life. No self-transfer option.
Options	N/A
Solution	Replace Check In Desks (135 desks). Enhance selected desks to process US departures. T1 & T2 Self Connect.
Driver	End Of Life, Pax Exp., CBP Capacity



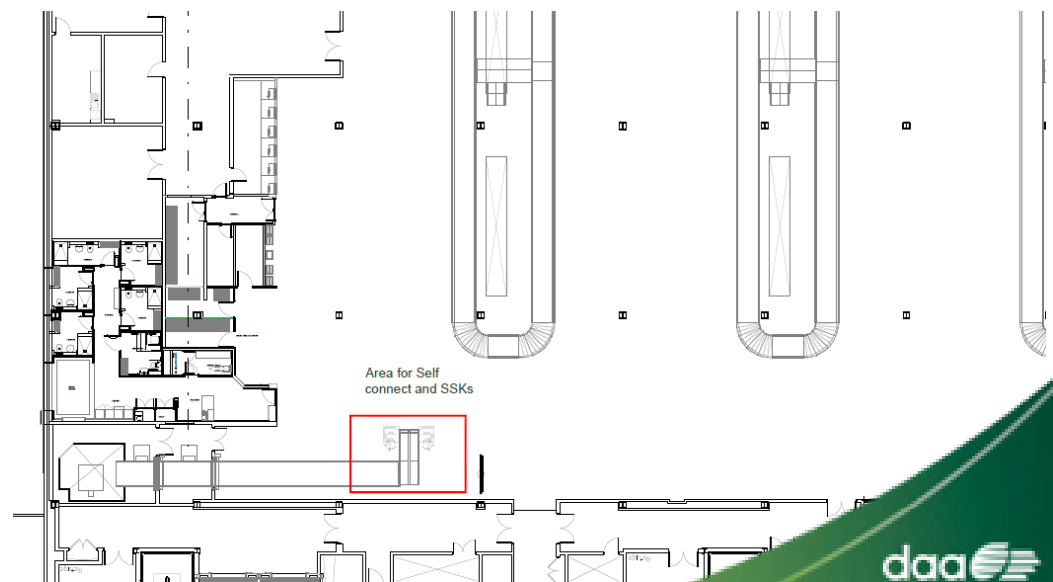
Plan showing check in desks to be replaced



Example of modern check-in desks design, Istanbul Airport

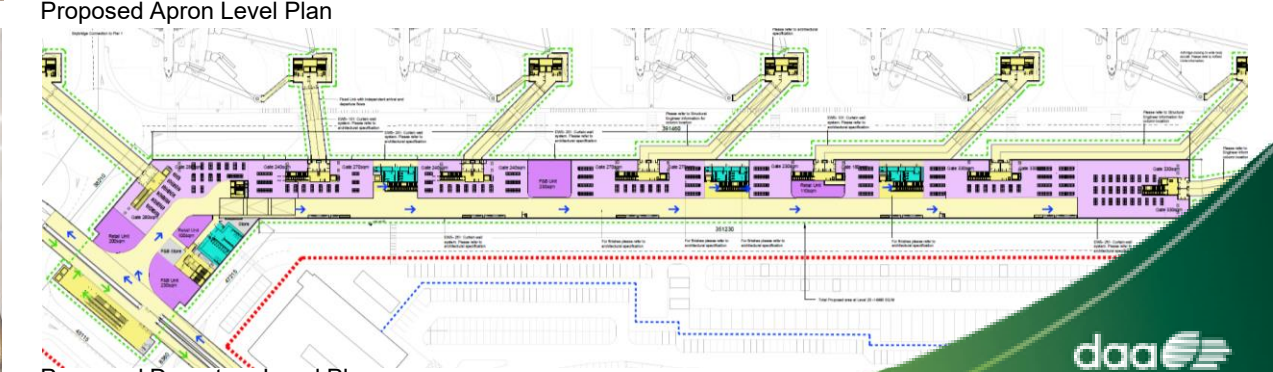
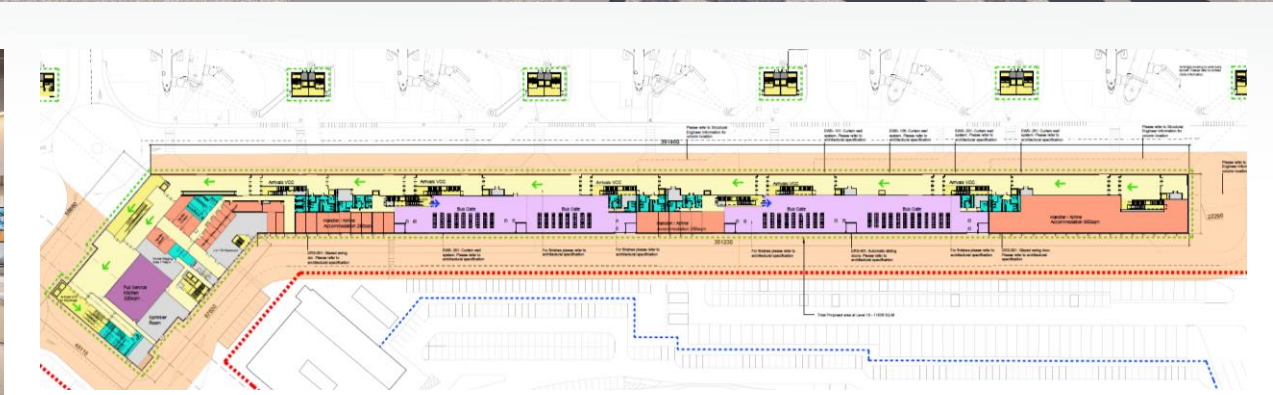
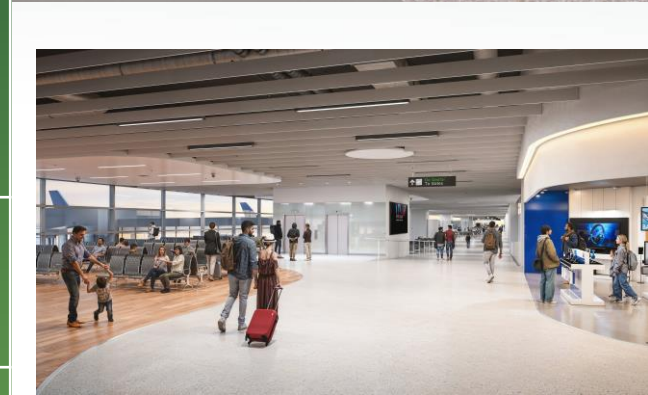


Possible Location for T1 Self Connect



Possible Location for T2 Self Connect

Name	Pier 1 East
Number	27.02.02
Envelope	Airport Development
Status	CIP2020 Roll Over
Problem	Inadequate no. of Terminal 1 enabled contact stands served by modern gates equipped with optional airbridges.
Options	N/A
Solution	Deliver full-service, full-length Pier 1 East serving 14 contact stands / 7 Code E and 6 Bus Gates
Driver	Gate & Stand Capacity



Pier 1 East



Fixed Links and Airbridges as Standard

Passenger Boarding Bridges

Safety

- Passengers trip and fall on aircraft steps
- Avoid passenger crossing busy head of stand road
- Aircraft steps get wet when raining causing additional passenger slips
- Passenger cannot interfere with any aircraft elements
- Passengers cannot disturb any apron activities
- Secure segregation of flights- particularly third state and CBP operations

Efficiency

- Faster aircraft turns
- Reduced delays for aircraft servicing vehicles without passengers crossing roads/ on the apron
- Improved boarding and un-boarding, avoids delay if no airstairs available
- Fixed link provides safe space for pre-boarding
- Secure routing of arriving passengers, who may try to avoid immigration channels

OPEX

- Reduced level crossing ground crew staffing
- Reduced PRM cost-equipment

Airlines

- Dual PBB for Wide Body Operators using multiple doors to speed up boarding, boarding different classes at the same time

PAX Experience

- Steps are not suitable in high winds, rain
- PBBs protect passengers from weather and noise
- Level of service passengers expect
- PBBs provide level access for PRMs minimising need for Ambi-lifts (123,000 Ambi-lifts in 2025)
- Better and safer PRM assist

Year	PAX slip, trip and fall on the apron (excl. AC steps)	PAX aircraft steps falls
2014	21	5
2015	18	8
2016	29	9
2017	22	7
2018	23	14
2019	9	11
2020	7	1
2021	2	7
2022	12	4
2023	13	13
2024	20	7
2025 to date	19	4

Airlines using PBBs

American Airlines

AIR MOLDOVA

AIR CANADA

AIRFRANCE

Aer Lingus

BA CITYFLYER

BRITISH AIRWAYS

DELTA

Emirates

ETIHAI AIRWAYS

FLYONE

FINNAIR

IBERIA

KLM

Lufthansa

SWISS

QATAR AIRWAYS

TAP AIRPORTUGAL

TURKISH AIRLINES

UNITED

Airlines that would prefer stand served by PBB if it was available:
WestJet, Iceland Air, SAS, EgyptAir, Air Canada (on Pier 1)

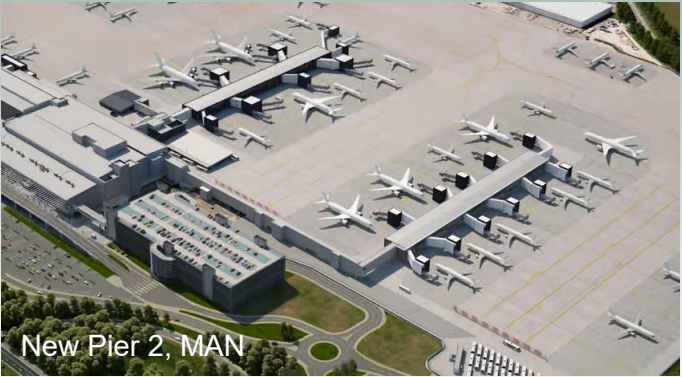
Year	Overall RPM	Ambilift only	% of PRM requiring Ambilift
2023	391,723	106,791	27%
2024	446,348	113,033	25%
2025	495,229	122,995	25%
projected 2026	528,899	136,746	26%

Fixed Links and Airbridges as Standard

Passenger Boarding Bridges

Manchester Airport (MAN)

- New Pier 2
- 13 new stands
- Delivered with PBBs
- Flexible design to serve small domestic planes to large long-haul jets like the A380



MAD airport



Barcelona El-Prat Airport (BCN)

- 30/ 48 gates equipped by PBBs serving T2

Madrid Airport (MAD)

- Total of 129 PBBs all operated remotely

Low- cost airlines use PBBs at other airports when required

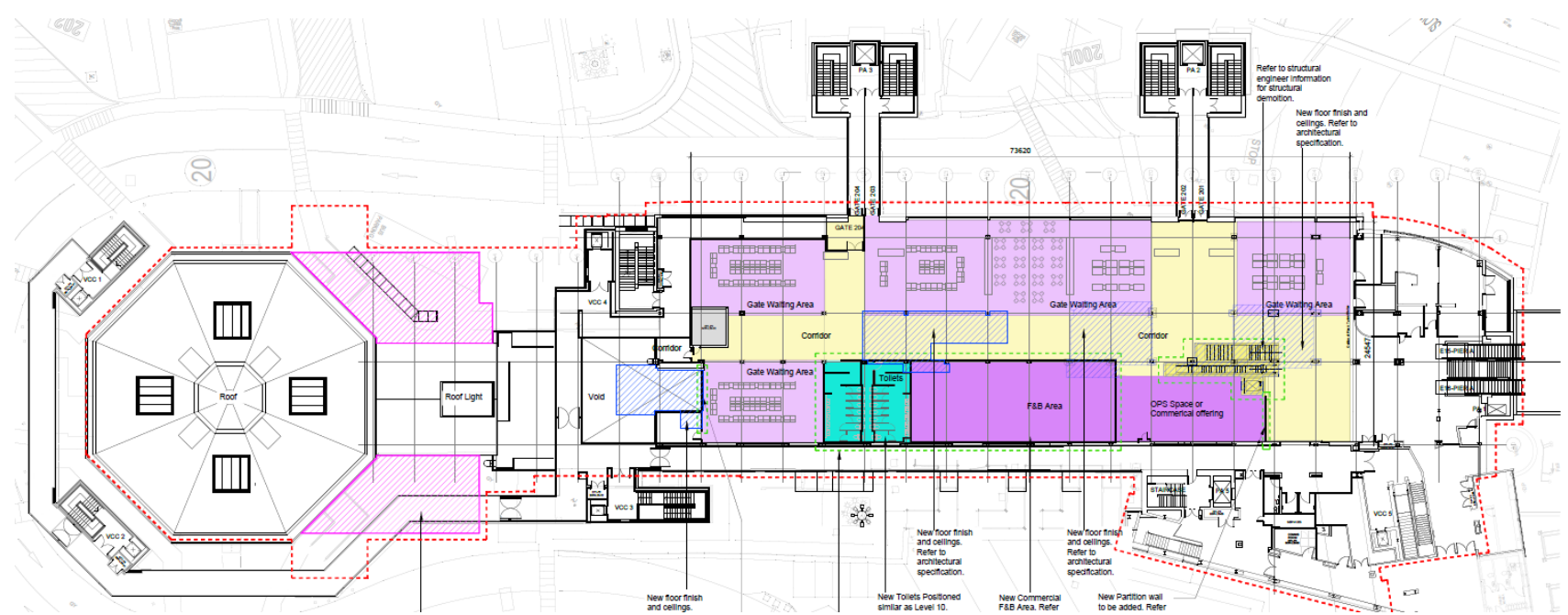


PBB Style- OshKosh supplier	Unit Cost	
Corrugated	€639k	
Corrugated/ cladded	€684k	✓
Truss/ steel	€727k	
Truss/ steel, partial glass	€732k	
Truss/ glass	€776k	
Freight, handling , testing and commissioning	€116k	

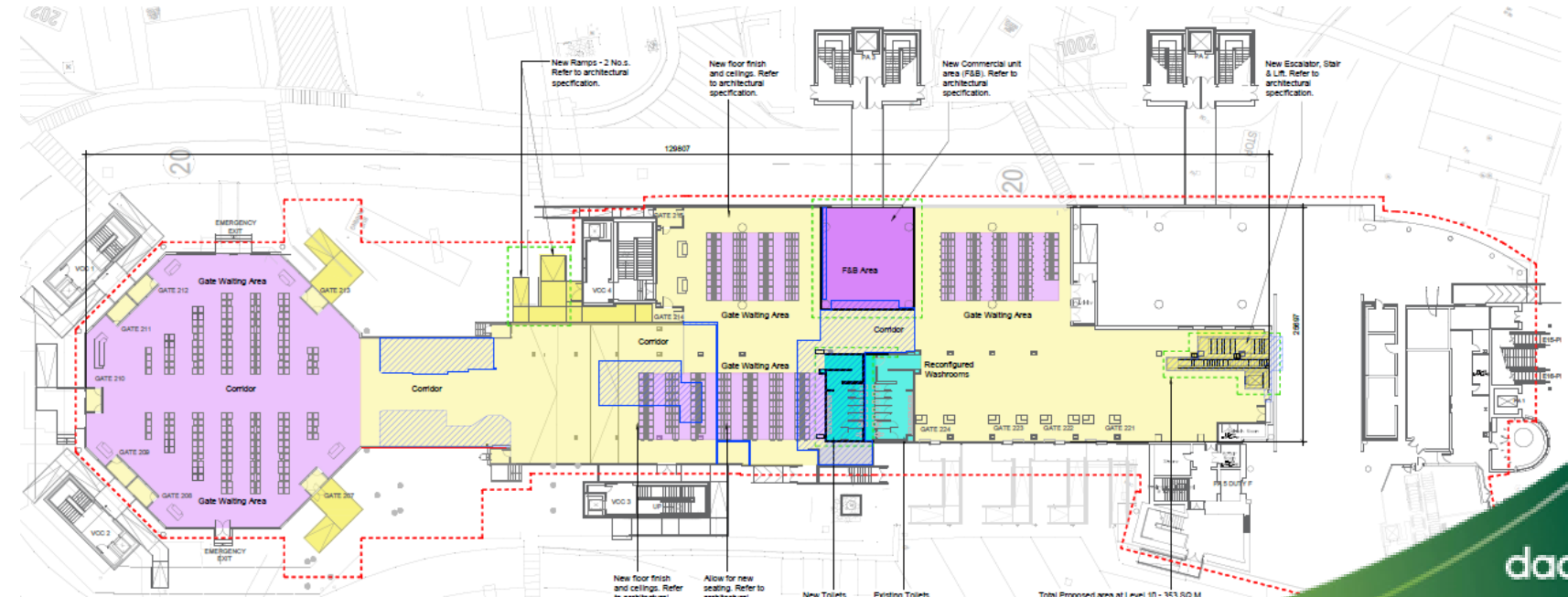
Year	Sum of PBB Charge by DAP (currently €9.30/ 15mins)
2019	€2m
2020	€1.2m
2021	€1.3m
2022	€2.1m
2023	€2.3m
2024	€2.6m
Total	€11.5mil

*Installation of est. 15% not included

Name	Existing Pier 2 Optimisation & Refurbishment
Number	27.02.20
Envelope	Airport Development
Status	New Project
Problem	Pier 2 is aged with suboptimal gate capacity F&B and circulation.
Options	Light touch refresh and internal reconfiguration. Full replacement of Pier.
Solution	Internal reconfiguration and refreshment. Façade Replacement
Driver	Capacity & Relocate Handlers



Proposed Departures Floor Plan (Indicative)

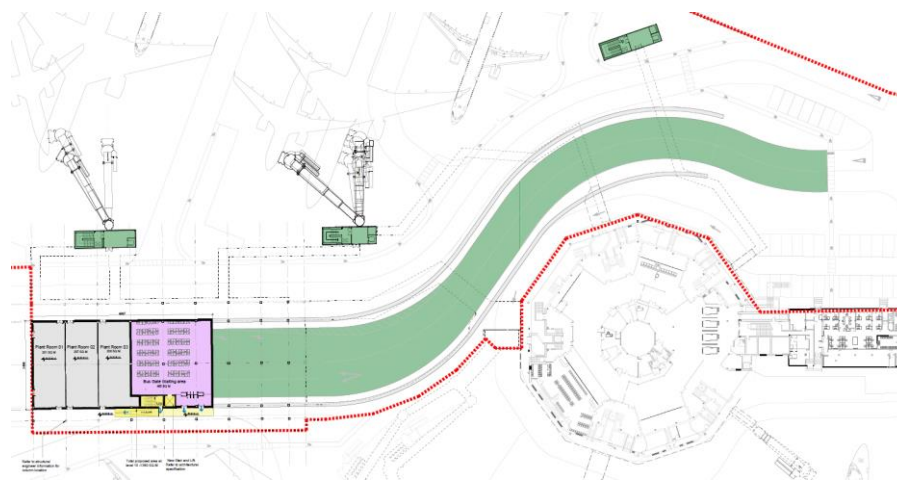
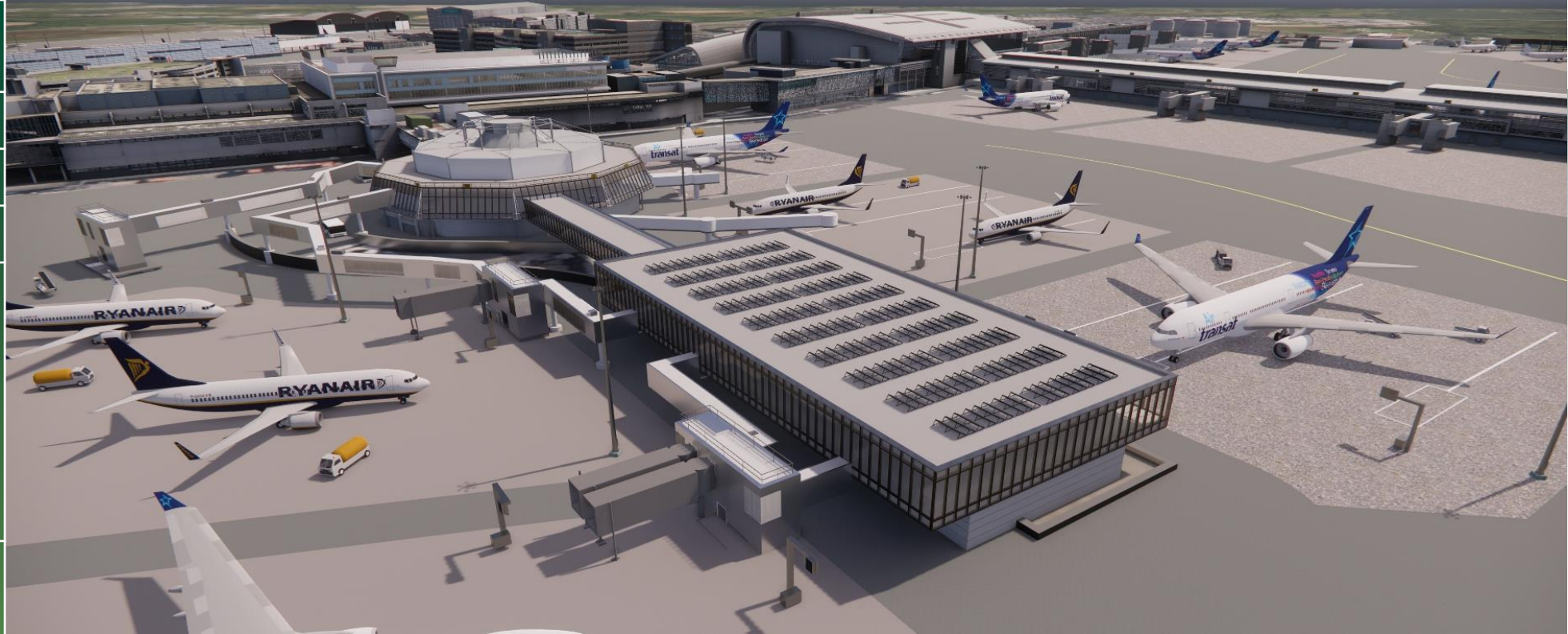


Proposed Apron Floor Plan (Indicative)

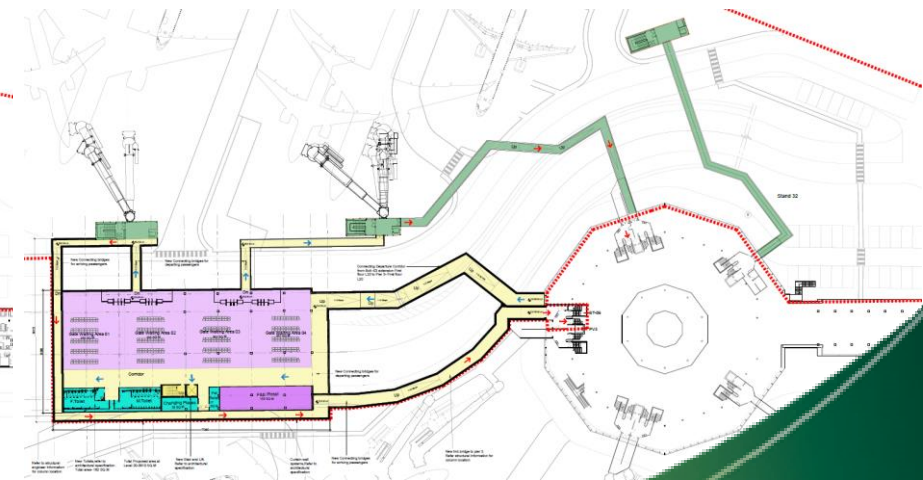
Pier 2 Bolt On Extension



Name	Pier 3 Bolt-On Extension
Number	27.02.41
Envelope	Airport Development
Status	Supplementary Project
Problem	Pier 3 is nearing end of life with suboptimal gate capacity and lacking modern airport services. Southern stands constrained & insufficient capacity for T2 overflow.
Options	Complete demolition and replacement. Partial Extension to complement refurb of existing.
Solution	Phased replacement with initial two-story bolt on extension – above underpass. (Future proofed)
Driver	Gate capacity, pax experience, enables pier replacement



Apron Level Plan



Departure Level Plan

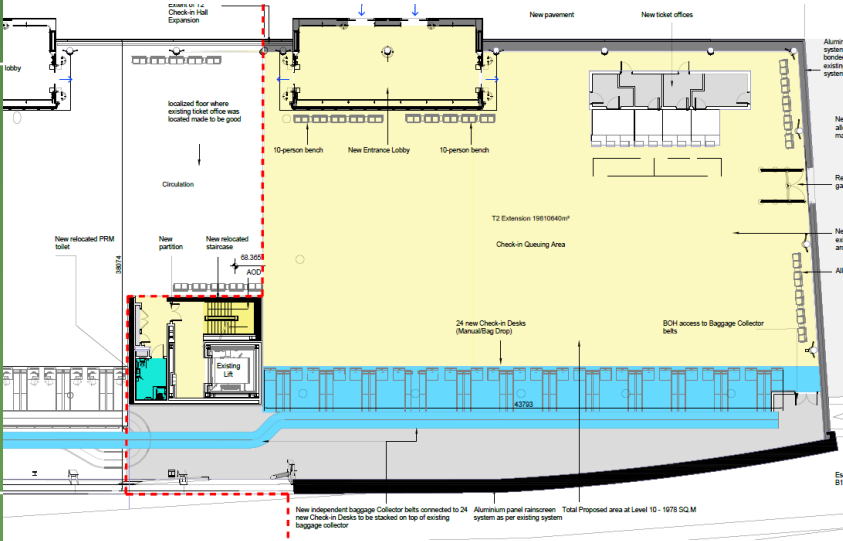
Pier 3 Bolt On Extension



Name	T2 Check-in Extension
Number	27.02.23
Envelope	Airport Development
Status	New Project
Problem	Check-in hall at capacity at peak times. Queue overflows into central area
Options	More common use / automation. Remote check-in. East hall extension.
Solution	Extend eastern end of hall and provide additional 24 new check-in desks with associated queue and circulation space.
Driver	Pax Experience, Capacity



Illustrative CGI showing extended T2 Check In Building - Indicative



Plan showing indicative extension of check in hall



Illustrative CGI showing extended T2 Check In Area Indicative sketch and draft costs for consultation only

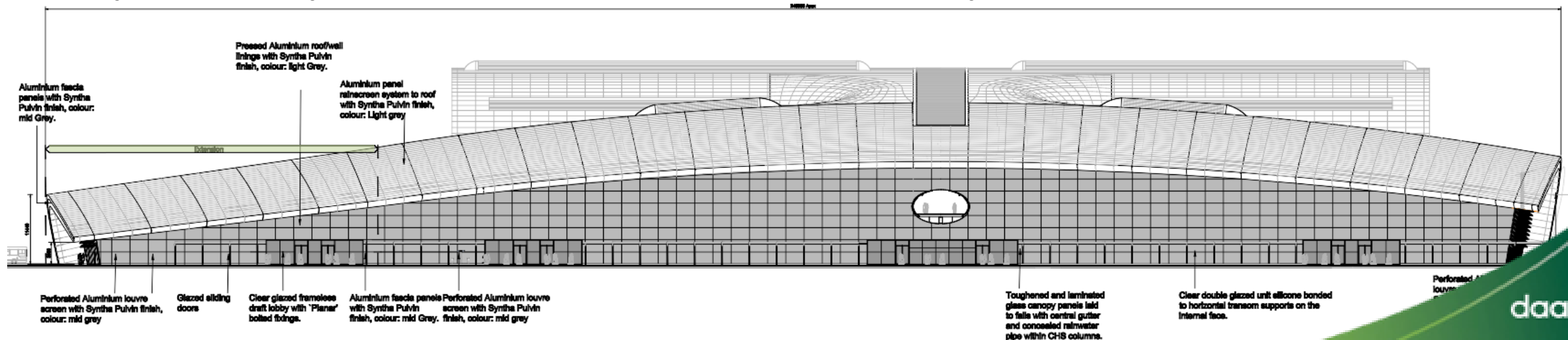
T2 Check-in Extension



Illustrative CGI showing extended T2 Check In Building - Indicative

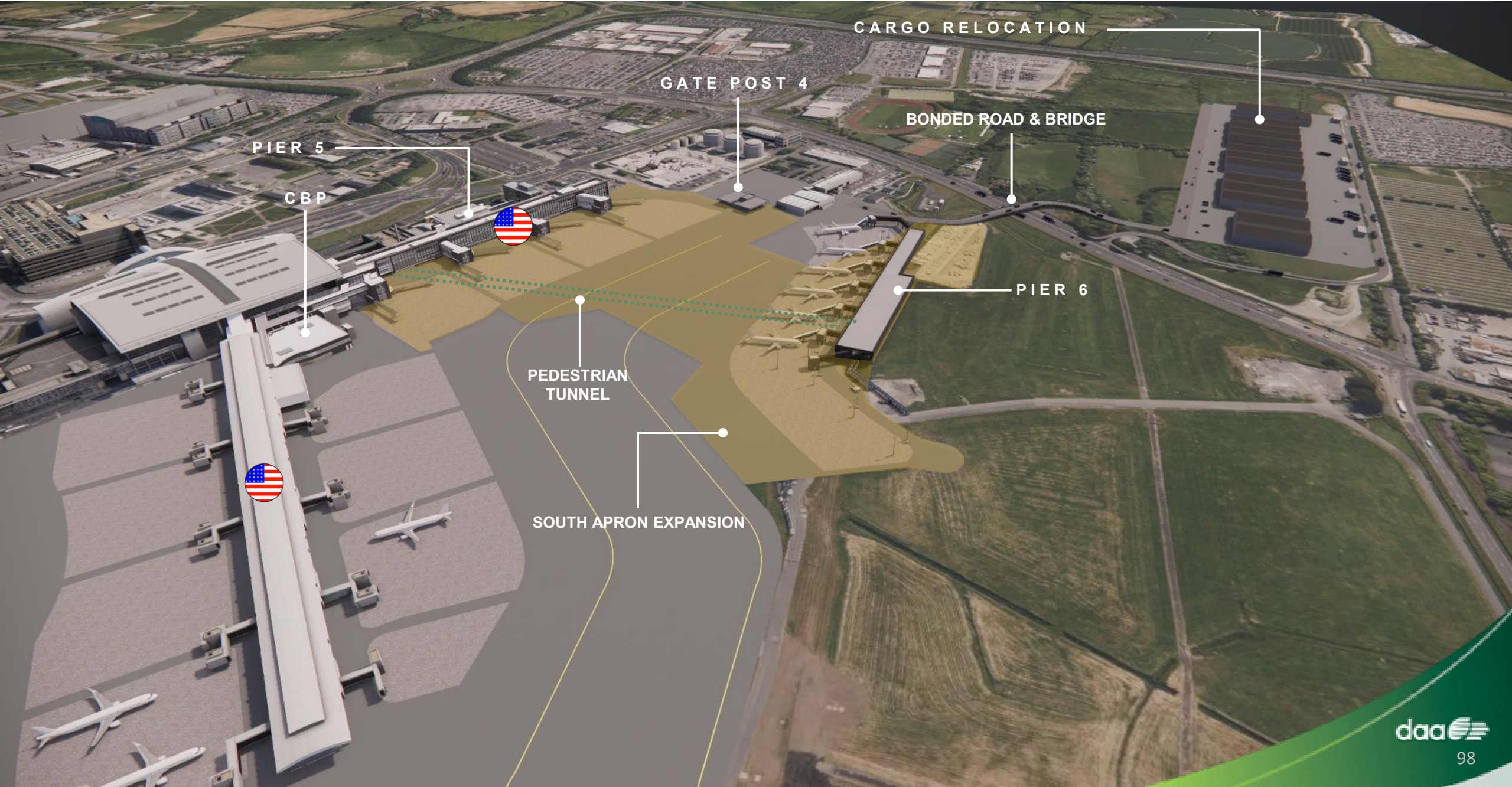


Illustrative CGI showing extended T2 Check In Area - Indicative

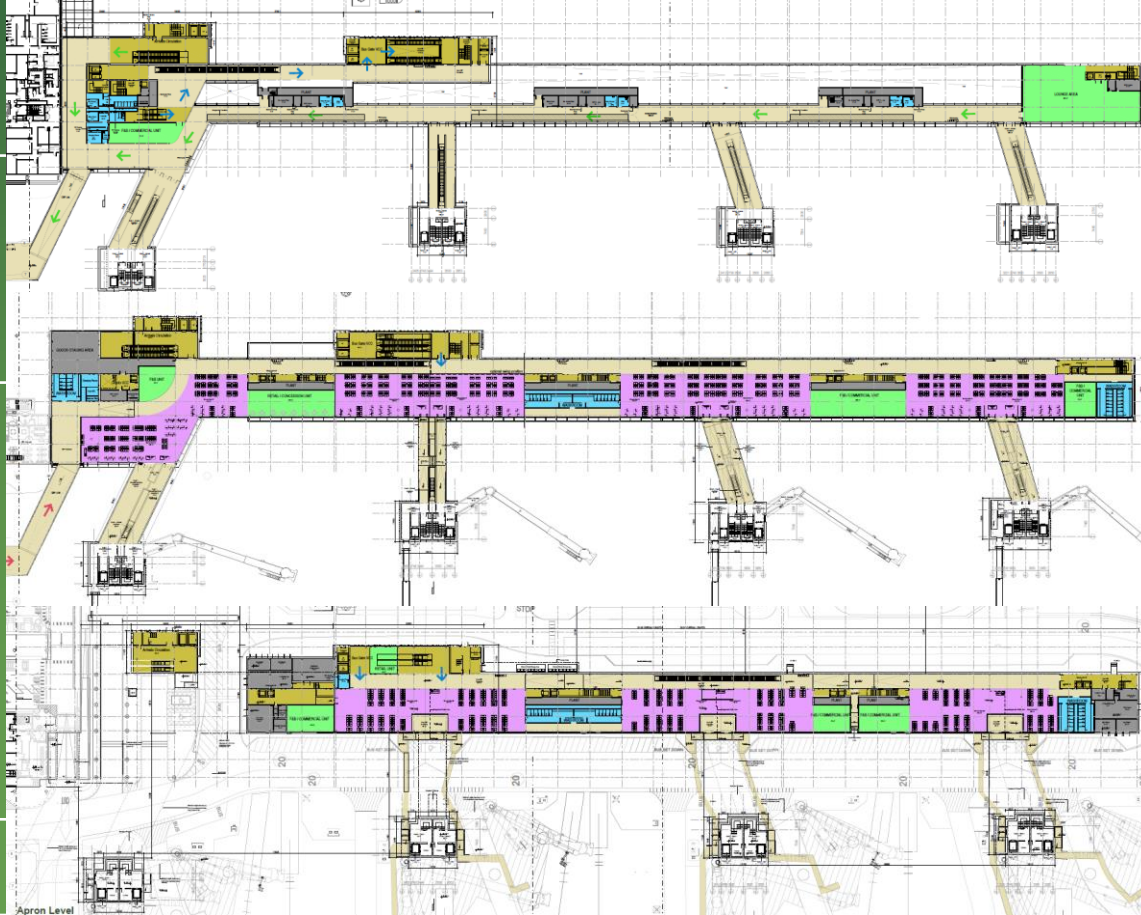


Proposed Elevation showing extended T2 Check In Building

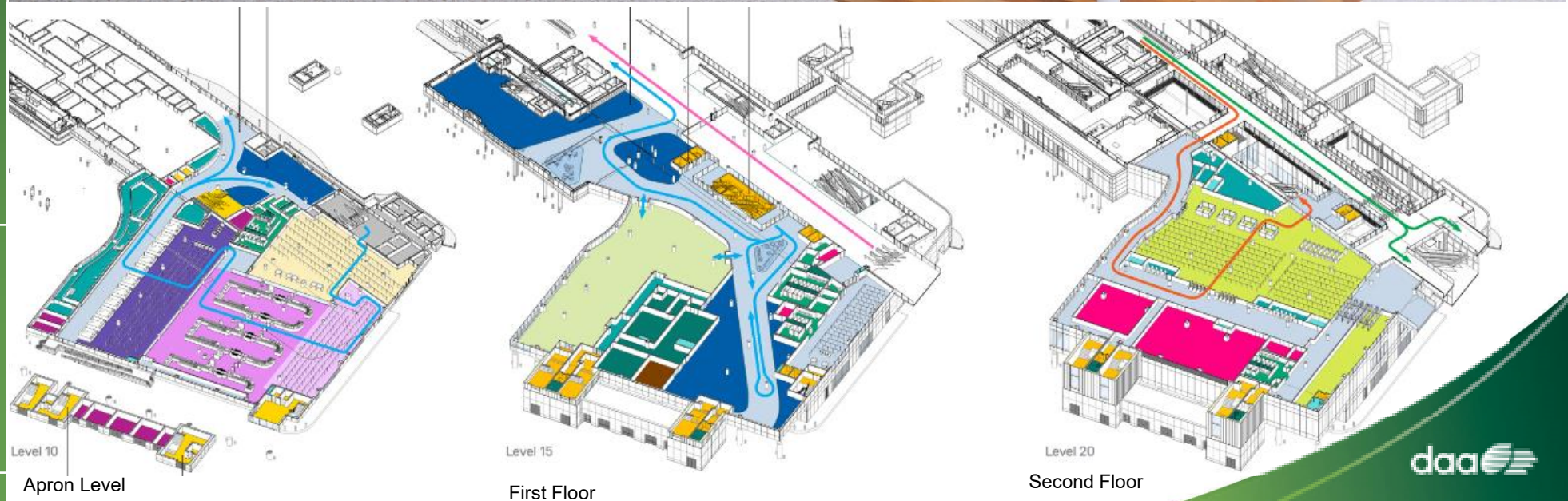
South Apron Hub Development Overview



Name	Pier 5 and South Apron Expansion
Number	27.02.05
Envelope	Airport Development
Status	CIP2020 Roll Over
Problem	Shortage of T2 WB contact stands (CBP & Other) and T2 Bus Gates
Options	Western Satellite Pier. Close 16/34 and extend Pier 3.
Solution	Full-service Pier with CBP segregation. 8 contact stands (4 MARS). 6 Bus Gates at apron level.
Driver	Gate & Stand Capacity



Name	T2 CBP & Transfer Extension
Number	27.02.04
Envelope	Airport Development
Status	CIP2020 Roll Over
Problem	CBP capacity and transfer capacity. Poor pax experience post-CBP
Options	1 storey CBP only extension. 2 story CBP/mini IDL extension. 3 story CBP/mini IDL and transfer facility extension.
Solution	3 storey building with enlarged TSA & CBP, mini-IDL (incl. lounge) and Transfer facility
Driver	CBP & Transfer Capacity



Questions