



IATA Global Passenger Survey

2023 Highlights

Nick Careen

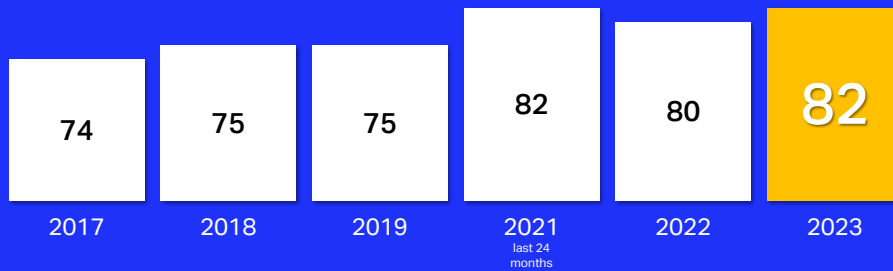
SVP, Airport, Passenger, Cargo, Security



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Growing satisfaction reaching record levels

% of Satisfied (very satisfied + somewhat satisfied)



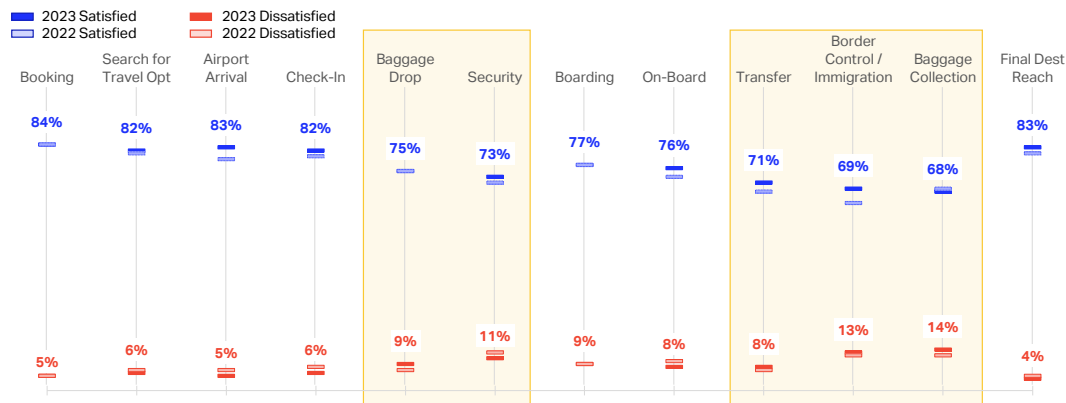
Source: Global Passenger Survey 2023
Base: N (2017)=10'575, N (2018)=10'408, N (2019)=10'877, N (2021)=13'579, N (2022)=10'206, N (2023)=8'790

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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

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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"

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Convenience is the driver for positive booking...

84%

travelers are satisfied 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

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... and payment experiences

3 out of 4

travelers are
satisfied with the
ticket payment
experience

73%

have preferred
paying with
credit/debit card

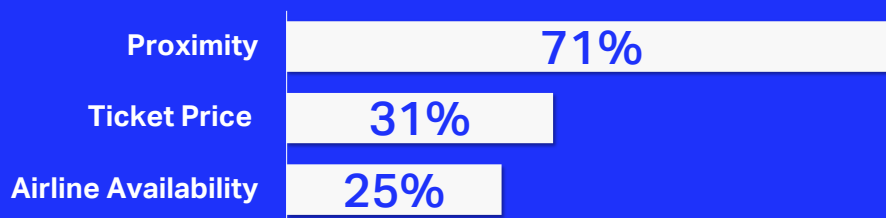
But preferred payment medium vary by region

	Global	Africa	Asia Pacific	Europe	LATAM	Middle East	North America
Debit/Credit Card	73%	57%	61%	81%	85%	70%	74%
Digital Wallet	18%	11%	41%	15%	4%	14%	8%
Bank Transfer	18%	36%	16%	17%	17%	21%	18%
Loyalty Points	17%	11%	11%	14%	20%	18%	25%

Ranking of preferred method of payment. Question with multiple choices.

Proximity is #1 reason for choosing departure location

Top 3 reasons for selecting your departure airport:



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Complex visa requirements deter travelers

36%

have been discouraged from traveling due to immigration requirements

49%

main deterrent is process complexity

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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

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

Multiple choice

	2022	2021
Data breaches:		
	49.2%	55.9%
Data being shared with other organizations:		
	41.4%	52.2%
Not knowing how long my data will be stored:		
	18.8%	20.1%
Lack of information on how my data is being handled/used:		
	39.5%	50.6%
Not knowing how I can have my data deleted:		
	16.3%	17.2%
Other, please specify:		
	2.9%	3.5%
I do not have any concerns with regards to the use of my biometric information:		
	9.4%	8.0%

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%

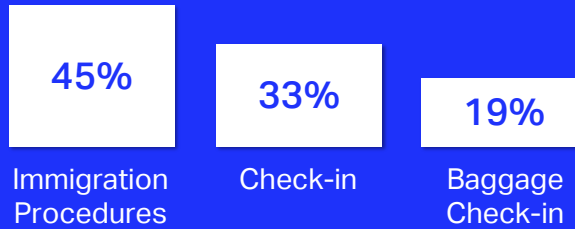
said they would be interested in a trusted travel program to get them through security faster

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Preference to complete certain processes off-airport

Top process to be completed before arrival at the airport



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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

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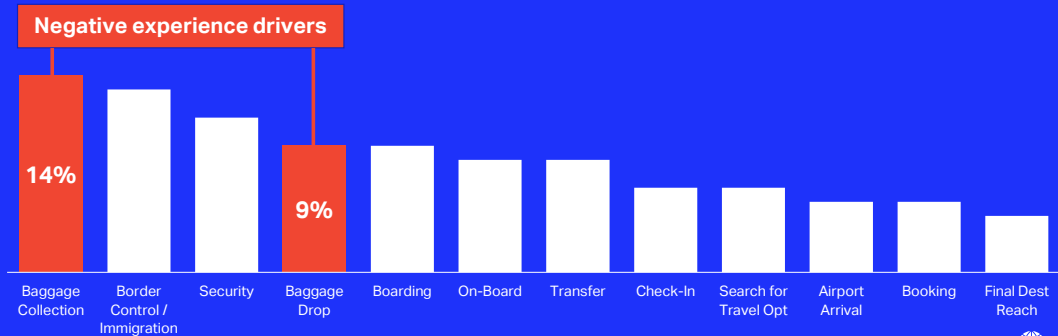
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Improvements for baggage and related services, but still a pain point

2023 Dissatisfied touchpoint ranked by the largest %



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