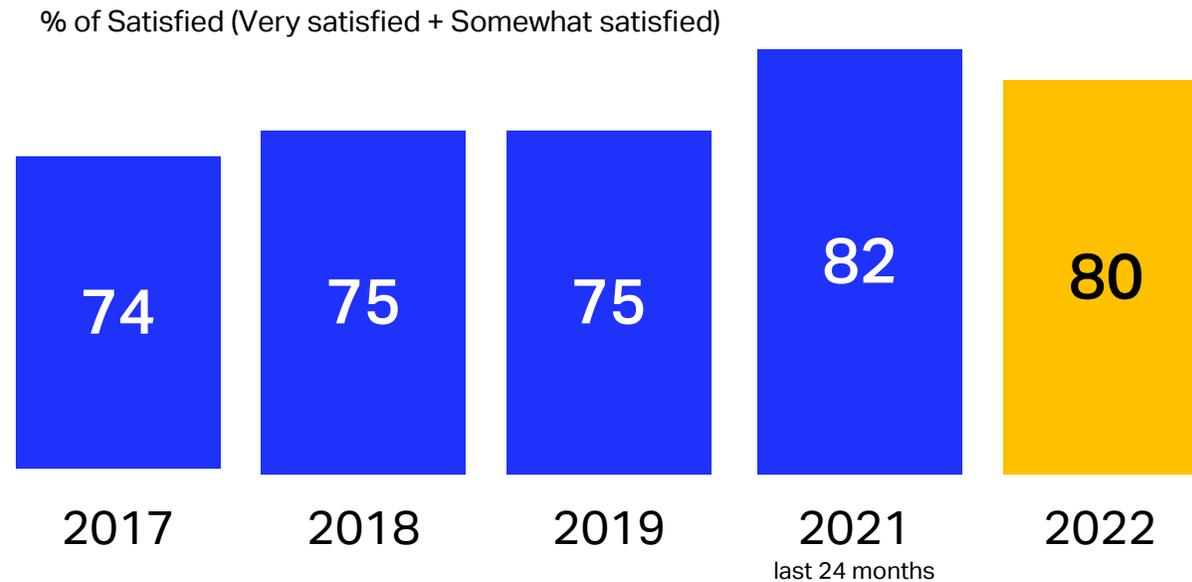


IATA Global Passenger Survey

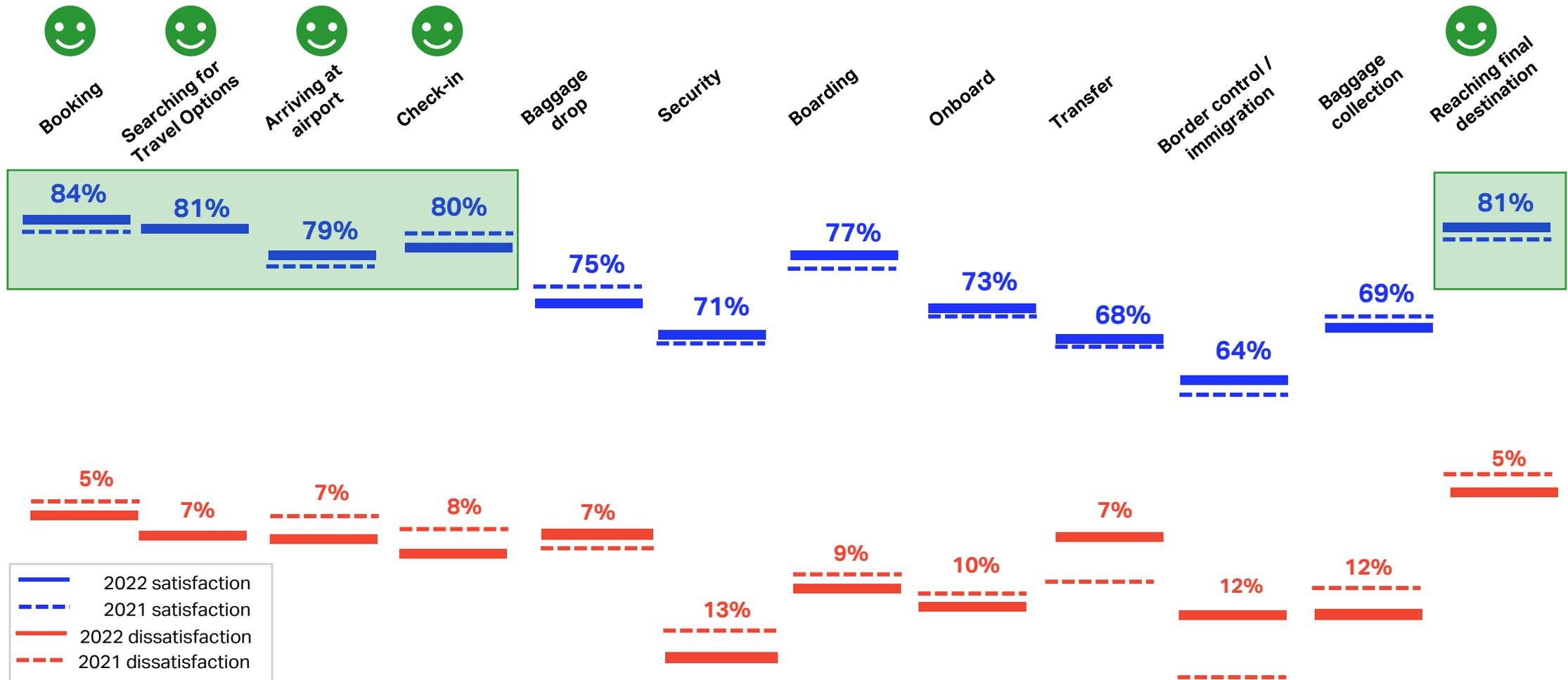
2022 Highlights



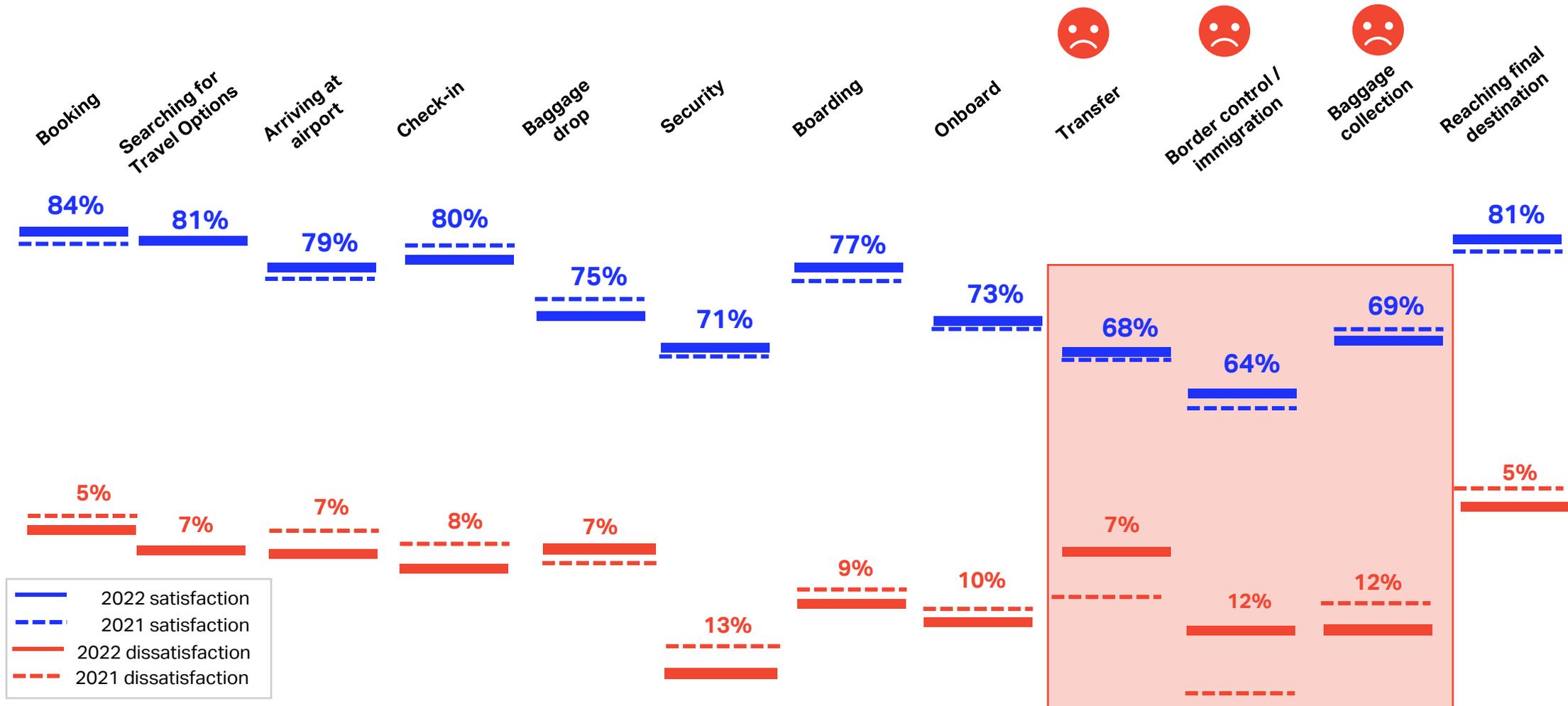
High satisfaction scores for 2 years in a row



Across the travel journey, top satisfaction levels for:



3 stress areas: transfer, immigration and baggage



Convenience is a key enabler for all touchpoints

PLANNING & BOOKING

"It would be so easy access all my trip information from one single location"

TRAVEL FACILITATION

"I am willing to share my information in advance and have contactless travel"

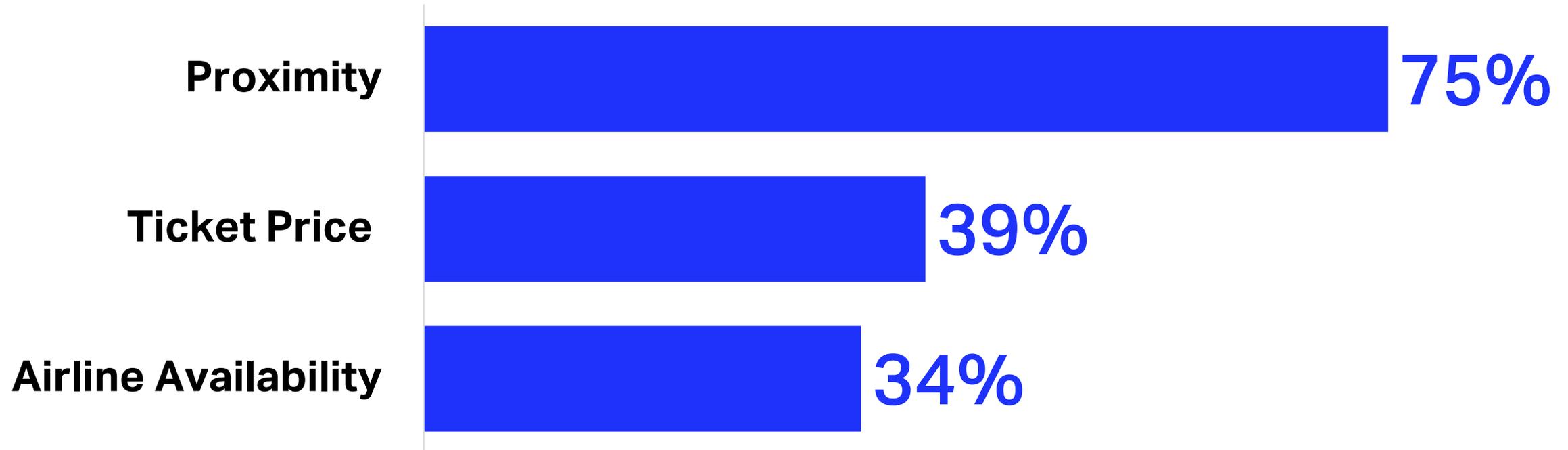
AIRPORT PROCESS

"I wish there could be alternatives to checking-in baggage"



Proximity is #1 reason for choosing departure location

Top 3 reasons for selecting your departure airport:



Convenience is a key satisfaction driver when travel planning

82%

passengers are satisfied when able to pick their preferred payment method

Clear improvement areas:

- Access to information in one single place
- Clarity & transparency on the offer content
- Ease of seat selection

Need to raise awareness on CO2 offsetting

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



30% are not aware of such an option

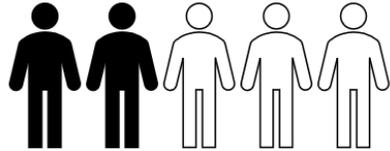


24% don't want to



18% don't have the option

Immigration requirements discourage travel



2 out of 5

have been discouraged from traveling
due to immigration requirements



65%

main deterrent is process complexity

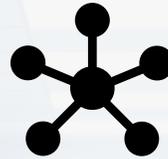
Technology simplifies travel and drives convenience



ONLINE VISA

66%

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



DATA SHARING

83%

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



BIOMETRICS

1 in 3

Have already used biometrics in the travel journey

Biometrics in travel is here to stay

88%

Passengers are satisfied with overall biometric process

75%

passengers would be eager to use biometrics instead of passports or boarding passes

Boost biometrics usage with better data protection

Top concerns with using biometric information

56%

loss of data due to data breaches

52%

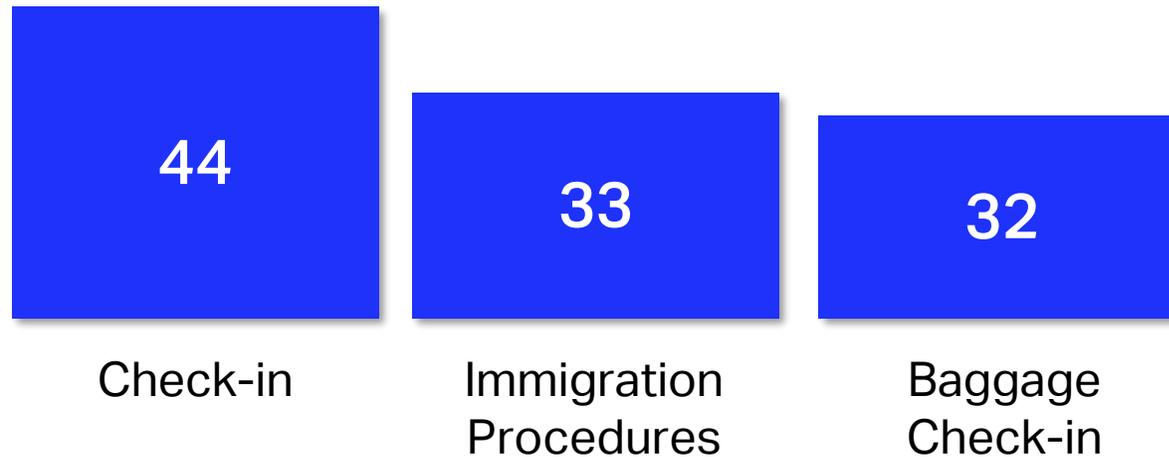
lack of knowledge of who the passenger data is being shared with

51%

not knowing how passenger data is being handled or stored

Preference to complete certain processes off-airport

Top process to be completed before arrival at the airport



Passengers would like to get through the airport as quickly as possible

Overall time spent at the airport



Ideal time spent at the airport



Less than 30min

When travelling with a carry-on bag only



Less than 45min

When travelling with a carry-on & check-in bags



Less than 1h

When travelling with mobility aid or other assistance

Queuing is a top improvement area

#1 improvement area for

Examples of improvement :

Security

93%

interested in a trusted program to expedite security screening

Boarding

25%

would appreciate not queuing on the jet bridge

Border Controls

20%

interested in automated solution to speed up control process

Baggage handling remains an issue



2 in 5

have had their bags
mishandled



1 in 5

expressed
dissatisfaction on the
service provided

Tracking could encourage passengers to check-in bags

29%

have flown with an airline that shared baggage information

81% (+8pp vs. 2021)

are more likely to check-in bags if it can be tracked at all times

51%

would be interested in a baggage information service

50%

have used and would be interested in using an electronic bag

Need for alternative options to check-in baggage



The airlines
would transfer
your bags from
home to your
final destination

2022

67%

2021

65%



Check-in a
baggage at
location
near you

73%

68%



Baggage on
a separate
flight than
you

46%

39%

More room for improvement in transfer experience

Only **68%**

satisfaction transfer at the Airport in 2022

Redundancy of processes negatively impacting satisfaction

Top 3 improvement areas for connecting flights



Not having to pick up
and re-check my bag



Not having to go through
security screening



Not having to go through
immigration

What are the solutions?



Modern Airline Retailing





Using **Digital Identity** technologies to transform the customer experience with:

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

Arrive at the airport **Ready to Fly**



Thank you!

