In 2015, the new ACS replaces ASQ Retail.

The Airport Consumer Survey (ACS) is a benchmarking programme that helps airport commercial teams **grow revenue & deliver the experience their passengers want**.

- **Identify** key segments
- **Understand** what drives satisfaction & spending
- **Benchmark & improve** your performance
Why improve the passenger experience?

**Make your airport a destination** and it’s easier to convince passengers to buy

An airport’s most satisfied passengers

- Spend **10% more time** at the airport
- Are **twice as likely** to shop
- Spend **7% more on duty paid** and **20% more on duty free**

Source: DKMA commercial research
What sort of ROI can you expect?

The airport customer service equation:

Overall satisfaction on a 5 point scale = +0.1

Non-aeronautical revenue per enplaned passenger = +0.8 $
How it will help you

Some of the key questions the research will help you answer

- Which passenger segments spend the most?
- How effective is our app at getting passengers to buy?
- Are passengers who use our premium car parks more likely to purchase in our shops?
- How do our conversion rates compare with the competition?
- What drives satisfaction and spending in our shops?
- Which restaurants do passengers prefer and why are we losing sales in our some of them?
- What drives satisfaction and spending in our shops?
ACS in action – sample analysis

See *where you are losing sales*

100%

Did you plan to buy F&B?

- Yes: 35%
- Undecided: 24%
- No: 41%

Did you buy F&B?

- Yes: 33%
  - Yes: Determined shoppers
  - No: Lost sales
- No: 9%
  - Yes: Won over
  - No: Missed opportunities
- Undecided: 15%
  - Yes: Impulse purchasers
  - No: Non-shoppers

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ACS in action – sample analysis

**Identify drivers of satisfaction** and focus efforts on the areas that matter most to your passengers

Importance to overall satisfaction

Satisfaction gap with benchmark average
ACS in action – sample analysis

See **who is buying and who isn’t**

<table>
<thead>
<tr>
<th>Gender</th>
<th>Age</th>
<th>Income</th>
<th>Reason for trip</th>
<th>Trip frequency</th>
<th>Dwell time</th>
<th>Traffic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determined</td>
<td>41 yrs.</td>
<td>MID</td>
<td>📦olders</td>
<td>MID</td>
<td>98 mins.</td>
<td>DOM / INT.</td>
</tr>
<tr>
<td>Won over</td>
<td>40 yrs.</td>
<td>MID-LOW</td>
<td>🛠️r</td>
<td>LOW</td>
<td>90 mins.</td>
<td>INT.</td>
</tr>
<tr>
<td>Impulse</td>
<td>42 yrs.</td>
<td>MID-LOW</td>
<td>📦olders</td>
<td>MID</td>
<td>87 mins.</td>
<td>INT.</td>
</tr>
<tr>
<td>Lost sales</td>
<td>38 yrs.</td>
<td>HIGH</td>
<td>🛠️r</td>
<td>LOW</td>
<td>88 mins.</td>
<td>INT.</td>
</tr>
<tr>
<td>Missed opp.</td>
<td>39 yrs.</td>
<td>MID</td>
<td>📦olders</td>
<td>HIGH</td>
<td>83 mins.</td>
<td>DOM / INT.</td>
</tr>
<tr>
<td>Non-shopper</td>
<td>45 yrs.</td>
<td>HIGH</td>
<td>📦olders</td>
<td>HIGH</td>
<td>76 mins.</td>
<td>DOM / INT.</td>
</tr>
</tbody>
</table>
ACS in action – sample analysis

All your key commercial KPIs for airport parking, F&B and retail on 1 single dashboard
Research goals

The Airport Consumer Survey helps airports **maximise passenger satisfaction & spending** by systematically improving the commercial experience.

1. OBSERVE
   Identify key segments & their purchasing habits

2. ATTRACT
   Evaluate effectiveness of airport marketing & communication

3. CONVERT
   Fix the reasons why passengers don’t buy

4. CONVINCE
   Identify drivers of satisfaction & spending so you can make your offering more attractive

5. MEASURE
   Benchmark & track performance over time

5 steps to **systematically improve airport commercial services**
Research concept

Passenger research to help you **improve your airport’s commercial offering**

**Tablet based**
For rapid reporting & maximum flexibility

**Two annual surveys**
Minimum sample of 1,000 interviews per wave to enable segmenting & drilling down into the data

**Dual focus**
Investigating the link between satisfaction levels and sales performance

**On the day rating**
Passengers complete survey in the gate area prior to boarding, rating their experience when it is fresh in their mind
Research concept

6 modules **cover your airport’s whole commercial experience & all your customers**

**Base programme modules**
Identify segments, assess the effectiveness of your airport’s communication efforts and drive satisfaction & spending for parking, retail and F&B

<table>
<thead>
<tr>
<th>Passenger segmentation</th>
<th>Marketing effectiveness</th>
<th>Airport parking</th>
<th>Food and beverage</th>
<th>Duty paid retail</th>
<th>Duty free retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW in 2015</td>
<td>NEW in 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify communication channels that drive sales</td>
<td>Improve your airport parking offering</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Optional modules**
Identify commercial opportunities for arriving passengers & assess needs of non-travelling customers

<table>
<thead>
<tr>
<th>Arrivals duty free</th>
<th>Meeters &amp; greeters</th>
<th>Airport staff</th>
<th>Special segments (Chinese pax, etc...)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW in 2015</td>
<td>NEW in 2015</td>
<td>NEW in 2015</td>
<td>NEW in 2015</td>
</tr>
<tr>
<td>Identify the needs of arriving passengers</td>
<td>Maximise your landside commercial offering</td>
<td>Identify the needs of airport staff</td>
<td>Learn what matters for key target segments</td>
</tr>
</tbody>
</table>
Simple, easy to use, hassle free

**Research app**
DKMA designed app specifically created for airport research

**Simple fieldwork**
Can be filled in by passenger or fieldworker

**Survey Library**
Access to full library of DKMA airport-specific surveys (non-benchmarking)

**Hassle free**
Data uploads automatically to DKMA servers via Wi-Fi

**Tailored to your needs**
Add or remove questions and specify outlet locations & brands

**On demand reporting**
Possibility of rapid interim reporting during the quarter

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What you get

All the insight you need to **maximise passenger satisfaction & spending**

1. **OBSERVE**
   - Detailed shopper profiles
   - Spend per passenger
   - Purchasing habits of key segments
   - Link with airport personas

2. **ATTRACT**
   - Most effective channels
   - See which marketing communications drive spending
   - Link to airport loyalty programme efforts

3. **CONVERT**
   - Main barriers to purchase
   - See which segments are buying / not buying

4. **CONVINCE**
   - Detailed satisfaction levels for parking, F&B and retail
   - Key drivers of satisfaction
   - Shop specific data
   - Conversion & penetration rates

5. **MEASURE**
   - Benchmarking information
   - Trend analysis to systematically improve

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About DKMA

DKMA has offices in Geneva and Montreal. We help over 300 airports worldwide maximize satisfaction & spending without investing a lot of money by working smarter, not harder.

Our story
DKMA was formed in 2005 and one of its first projects was to develop and manage the Airport Service Quality initiative in partnership with ACI.

Since then, we have become one of the world’s leading airport market research consultancies, specializing in helping airports grow their non-aeronautical revenue by delivering an improved passenger experience.

Over the years we’ve worked with over 300 airports around the world as well as airport management groups, banks, investors and concessionaires.

Our services
- Passenger research
- Service quality advisory
- Service quality management training
- Traffic forecasts

What makes DKMA unique
- Airport service quality expertise gained from launching & developing the ASQ initiative in partnership with ACI
- Unique framework for managing service quality. We know what works and what doesn’t
- We work exclusively with airports and understand what you do

Some of the airports we are helping

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Ready to get started?

Ready to **improve your airport’s retail performance**?
Contact DKMA to request a trial or to set up the Airport Consumer Survey at your airport

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