



AIRPORT SERVICE QUALITY

BENCHMARKING THE GLOBAL AIRPORT INDUSTRY

Best Practice Report

Internet Access



Introduction

Airport Service Quality (ASQ) is a comprehensive ACI initiative to help airports in their continuing efforts to improve the quality of service experienced by passengers.

The Best Practice Reports are an additional service offered as part of the ASQ Survey and are part of the programme's commitment to identifying and disseminating best practices from top-performing airports around the world.

The report focuses on a specific topic, aiming to provide a comprehensive picture of practices at participating airports as well as to serve as the basis for further discussions between ASQ participants.

The reports are based on information collected from airports participating in the ASQ Survey using an on-line questionnaire. The present document is a short presentation of the main results of the research and has been rendered anonymous. ASQ participants received the full report along with individual profiles for all airports which participated in the on-line survey.

The topic of this Best Practice Report is internet access. The research focused on the two main ways passengers have to access the internet while at an airport: wi-fi and internet kiosks. The following aspects are covered in the report:

- ➔ Availability of internet services
- ➔ Coverage / locations
- ➔ Cost of accessing the internet
- ➔ Internet access management
- ➔ Additional IT services
- ➔ Profiles of each airport contributing to the report

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Survey Participants

Africa / Middle East - Asia (23)

Amman, Auckland, Bangalore, Bangkok, Beijing, Cairo, Christchurch, Delhi, Doha, Gold Coast, Hong Kong, Hyderabad, Kuala Lumpur, Melbourne, Mumbai, Muscat, Nagoya, Nairobi, Seoul ICN, Singapore, Sydney, Tel Aviv, Tokyo NRT

Americas (31)

Atlanta, Austin, Baltimore, Barbados, Bermuda, Boise, Calgary, Cleveland, Curacao, Dallas DFW, Denver, Detroit, Edmonton, Fort Lauderdale, Guayaquil, Halifax, Houston HOU, Houston IAH, Jacksonville, Mexico, Minneapolis, Montreal, Ottawa, Port Columbus, Salt Lake City, San Antonio, San Diego, San José, Toronto, Vancouver, Winnipeg

Europe (30)

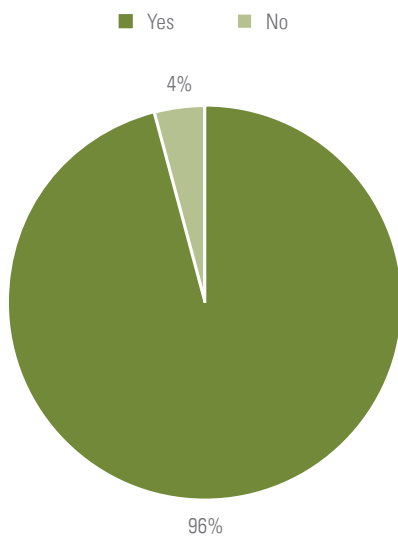
Amsterdam, Athens, Belfast, Budapest, Copenhagen, Dublin, East Midlands, Faro, Geneva, Helsinki, Keflavik, Krakow, Lisbon, London LTN, Lyon, Madeira, Madrid, Malta, Manchester, Milan LIN, Milan MXP, Moscow DME, Munich, Paris CDG, Porto, Rome FCO, Stockholm ARN, Stockholm NYO, Vienna, Zurich

Airport wi-fi

This section provides a detailed picture of the type of wi-fi service offered by participating airports as well as the pricing and management of the service.

Passengers have come to expect airports to provide wi-fi since it is offered in many other public spaces (restaurants, shopping malls, etc...). Airports have clearly recognised this as the overwhelming majority (96%) provide wi-fi to their passengers.

Does your airport provide wi-fi?

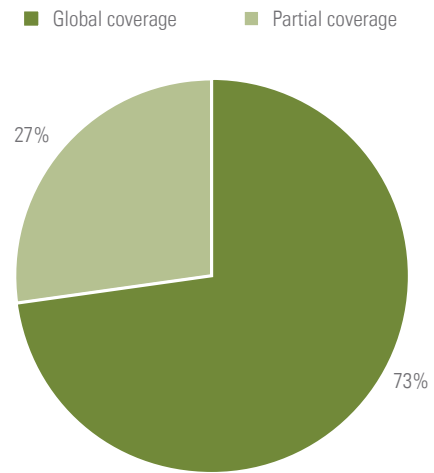


The type of wi-fi coverage offered by airports can be split into two categories:

- ➔ **Global coverage**
Passengers can access the internet anywhere in the terminal.
- ➔ **Partial coverage**
Wi-fi is only available within a specific area (hotspot) or limited to certain airline lounges or retail outlets.

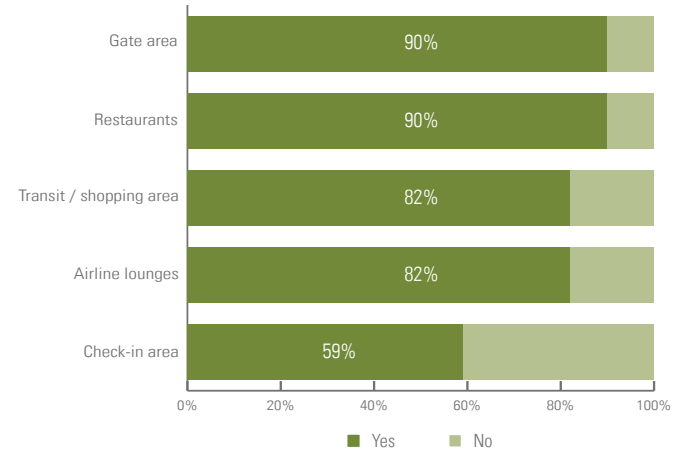
Most airports (73%) provide global coverage. The airports who have chosen to offer partial coverage are either smaller airports who do not wish to invest in an expensive wi-fi system or large hubs whose size makes providing global coverage difficult.

Type of coverage provided



In order to reach the largest number of passengers, airports providing partial coverage focus on areas with high passenger concentrations such as the gate areas, retail and transit areas. Fewer airports provide wi-fi access landside.

Partial coverage priorities



ASQ Survey results show that satisfaction levels are not impacted by the type of coverage offered. Satisfaction levels for “internet access / wi-fi” are only slightly higher for airports which provide global coverage (3.34) than for those providing partial coverage (3.24).

Wi-fi pricing & management

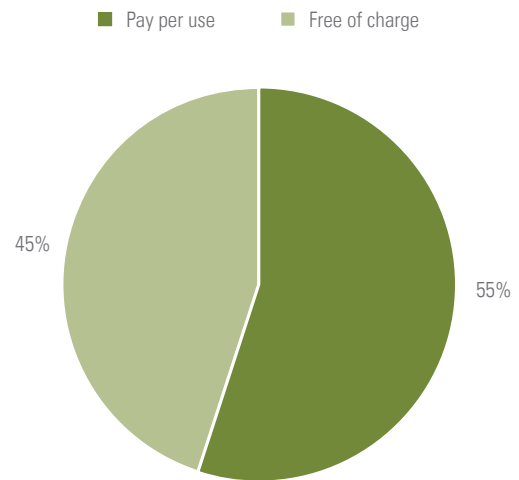
Whether or not an airport should charge for the use of the wi-fi system is a hotly discussed issue both among passengers and ASQ participants. The survey results reflect the division since 55% of airports charge for the use of wi-fi and 45% provide it free of charge.

In order to compare the average cost of 1 hour's access to the wi-fi system in different airports, all prices were converted into US dollars. Prices vary widely, ranging from USD 2.38 to nearly USD 15 per hour.

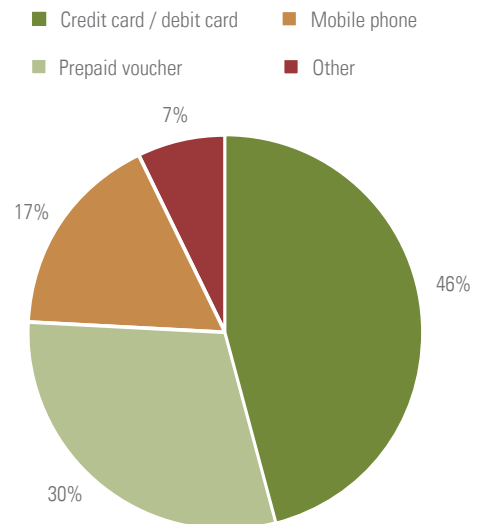
In some airports the hourly rate is the same as the daily rate. The most expensive airports provide passengers with a premium service in exchange for the higher price: travellers often receive multi-usage connections which are valid over an extended period of time. This type of service is useful for creating loyalty among business passengers who fly out of the airport frequently and are willing to pay extra for a higher quality service.

Among the payment methods, credit card and prepaid vouchers are the most commonly used. Also increasingly popular are global wi-fi accounts such as Boingo and iPass which provide passengers with a global network of hotspots to connect to.

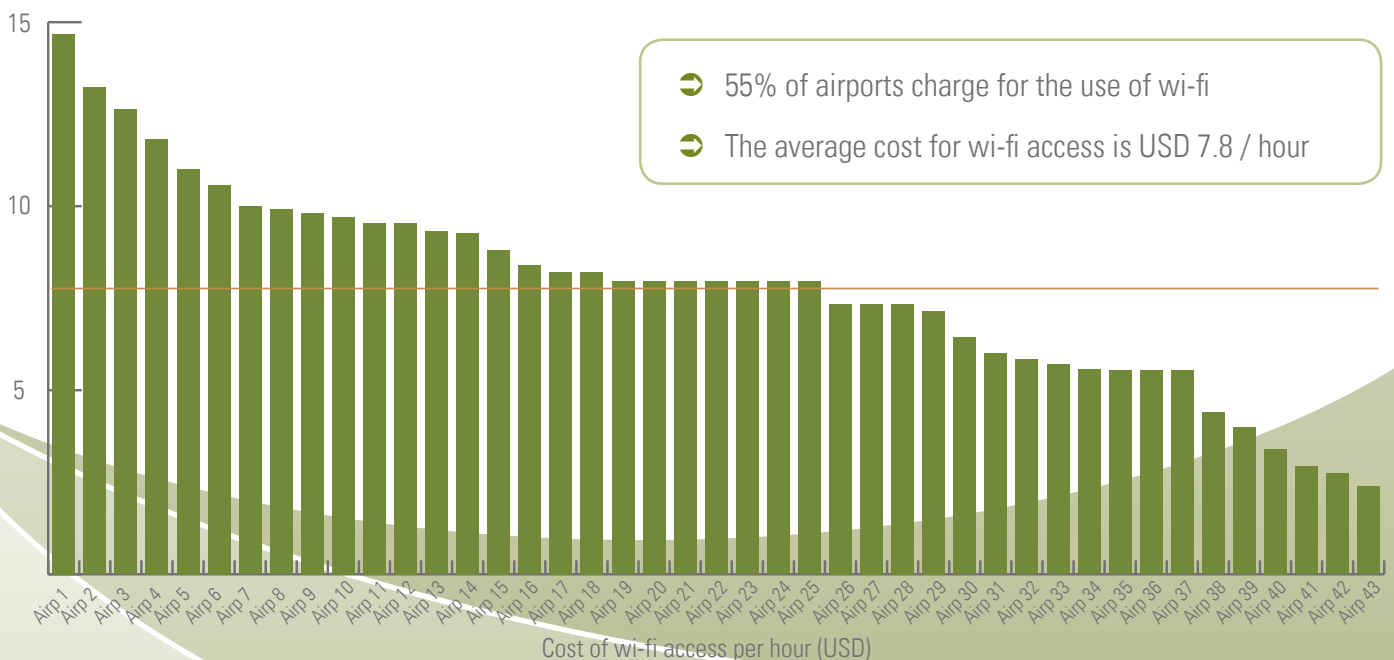
Use of wi-fi system is...



Wi-fi payment methods



Wi-fi price benchmark

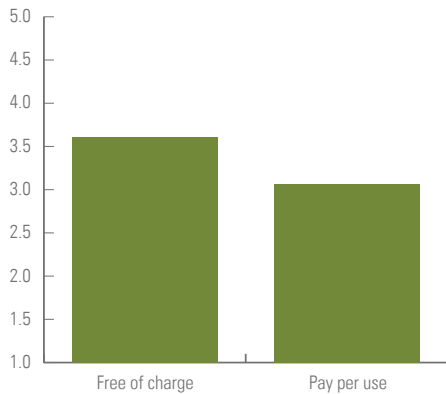


Wi-fi pricing & management

Whereas the type of coverage provided by the airport has little impact on passenger satisfaction levels, the price directly impacts satisfaction levels.

ASQ Survey results show that on average airports that charge for the use of wi-fi achieve lower satisfaction levels for "internet access / wi-fi" (3.06) than airports which provide the service free of charge (3.61). This difference most likely reflects the fact that passengers are used to free wi-fi in other public spaces (hotels, shopping malls, etc...) and do not appreciate the need to pay while at the airport.

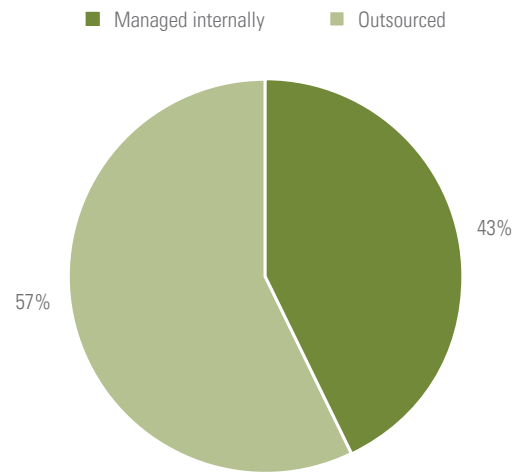
Ratings for "Internet access / wi-fi"



A potential pitfall of free wi-fi however is that airports which provide the service free of charge experience a much higher usage rate of the wi-fi system than those which charge for the service. If the system is not properly managed this large volume of connections may slow the whole wi-fi network down, penalising exactly those passengers who need to use the system most: business travellers.

Most airports have chosen to outsource the management of their wi-fi system. This reflects the complexity of wi-fi systems which need to be actively monitored and managed in order to provide a high quality service to users.

Wi-fi management



ASQ Survey results indicate that airports which outsource the management of their wi-fi system achieve slightly lower satisfaction levels (3.30) than airports which manage the service internally (3.32). This difference is due to charging for the service as airports where the service is outsourced are more likely to charge passengers to pay the supplier.

Internet kiosks

The second major method passengers have to access the internet while at an airport are internet kiosks. These are the workstations located throughout the terminal which enable passengers who do not have a laptop to access the internet.

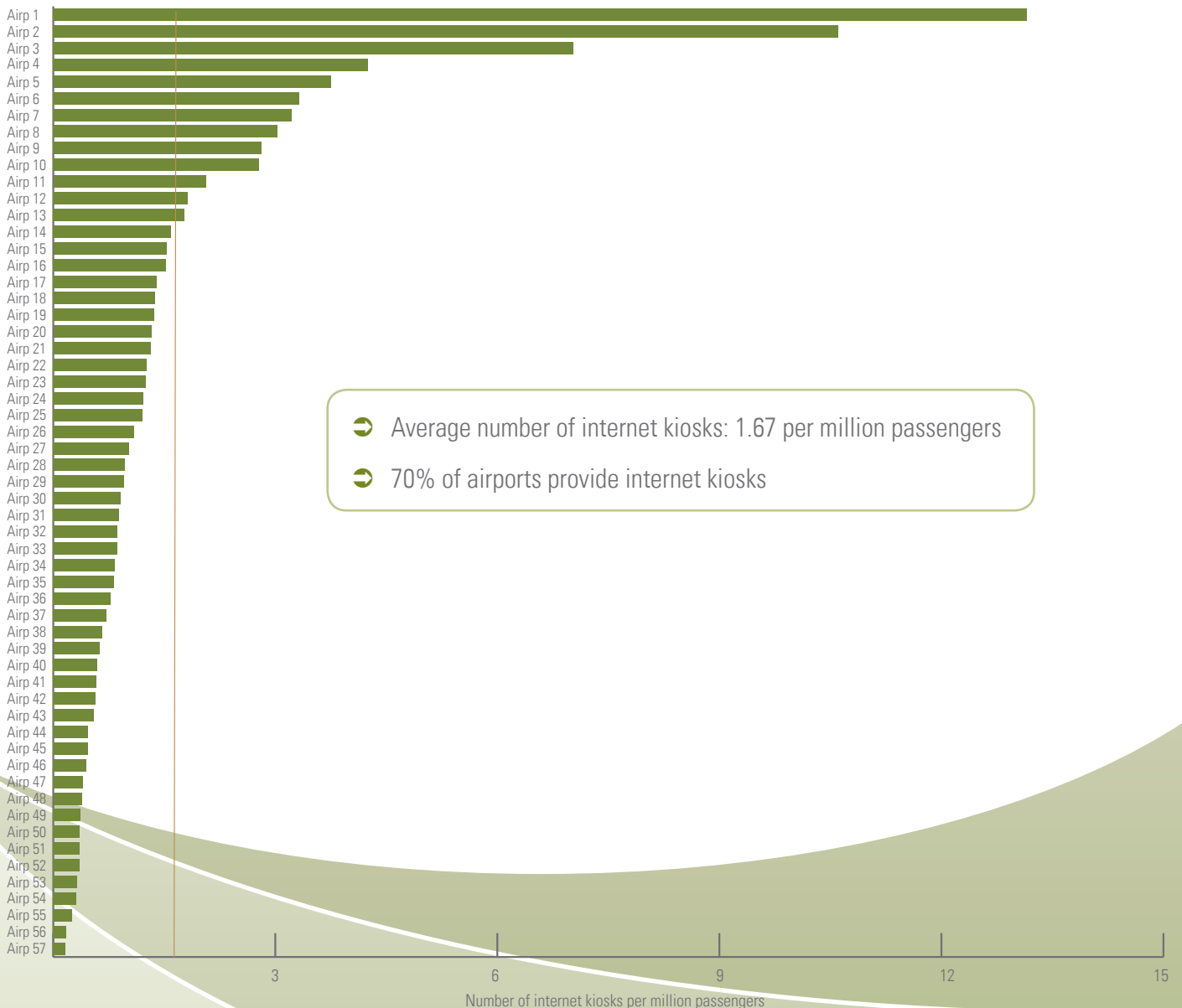
Internet kiosks are less widespread than airport wi-fi but are still offered by the majority of airports (70%). In order to be able to compare the number of kiosks offered by airports of different sizes, we have chosen to compare the following ratio: number of internet kiosks per 1 million passengers per year.

On average the number of internet kiosks is 1.67 per million passengers. The ratio is higher in many smaller airports

simply due to the low number of annual passengers.

In terms of locations, kiosks are mainly found in the transit and gate areas of the airport in order to reach the highest number of passengers. As was the case with the wi-fi system, relatively few airports provide kiosks landside.

Internet kiosks



Kiosk pricing & management

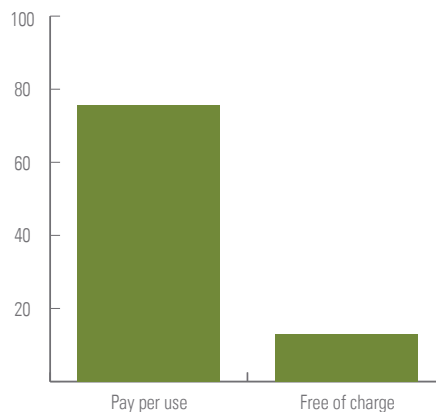
The proportion of airports which charge for the use of internet kiosks (76%) is much higher than for wi-fi systems (55%). Only a few Asian and North American airports provide kiosks free of charge and these tend not to charge for wi-fi either.

This difference is due to the fact that nearly 80% of airports outsource the management of their internet kiosks as well as the fact that kiosks need to be maintained and replaced on a regular basis due to wear and tear.

Passengers generally pay per minute or for 10-15 minute periods. The average cost of 1 hour's connection using a kiosk is USD 10.39 which is considerably higher than the average cost per hour for wi-fi (USD 7.80).

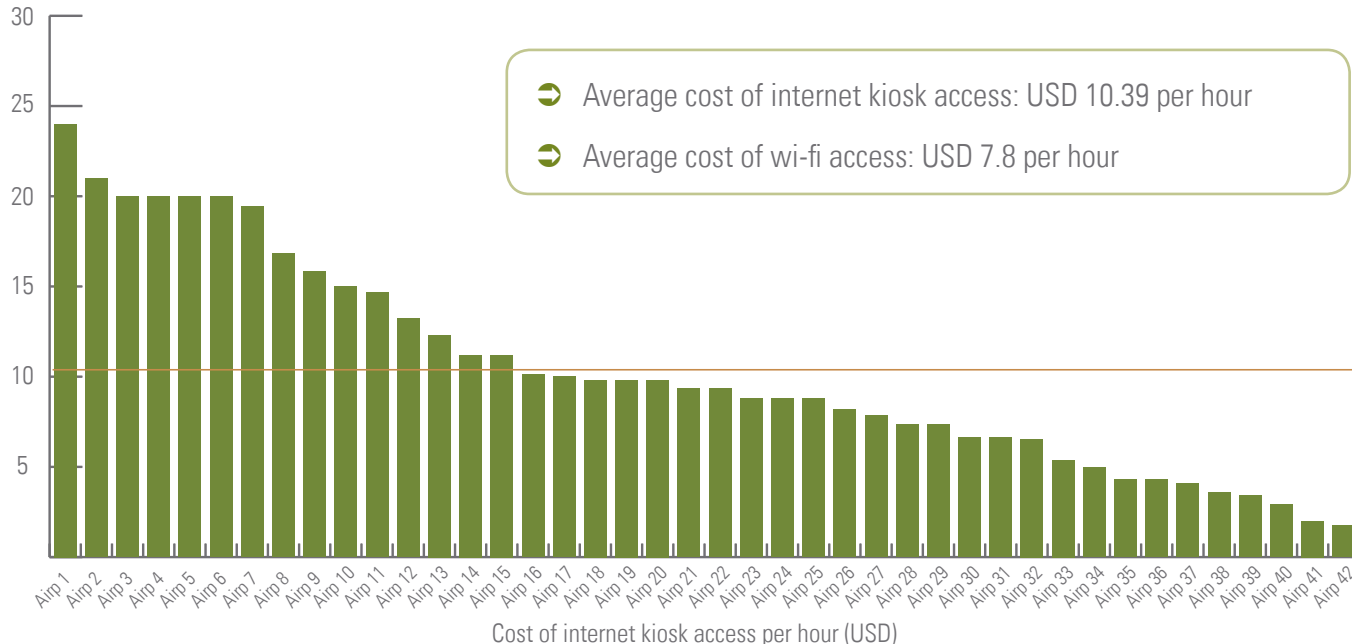
The most expensive airports are all located in the US, with the most expensive airport charging nearly USD 25 per hour. Asian and European airports generally charge far less.

Use of the internet kiosks is...



While the hourly rate seems fairly high, it is important to keep in mind that the profile of passengers using the kiosks is different than those who use the wi-fi. Kiosk users tend to be more occasional internet users who connect for shorter periods than wi-fi users who are generally business passengers wishing to work while at the airport.

Internet kiosk price benchmark



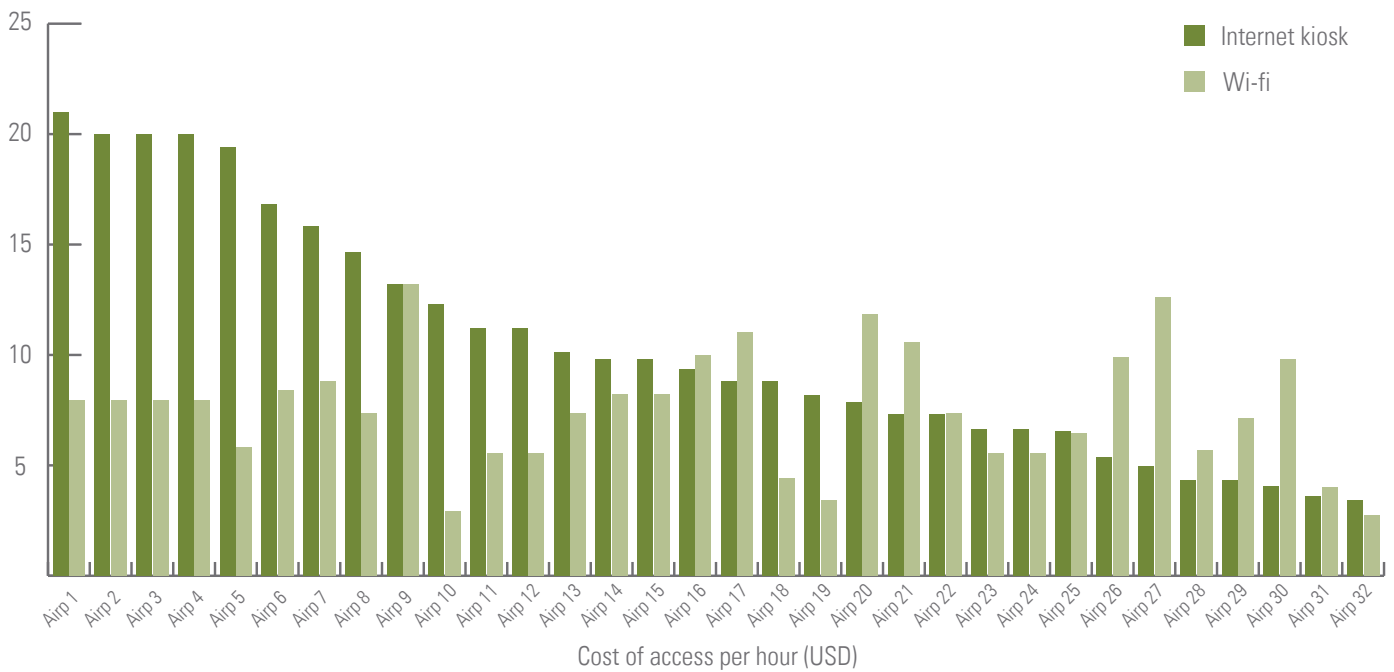
Kiosk pricing & management

Comparing the cost per hour of usage of the airport wi-fi system with that of its internet kiosks reveals different pricing strategies:

- ➔ **Medium to low-priced wi-fi and expensive internet kiosks.** This is the case in many North American and European airports where the use of internet kiosks is nearly 3 times more expensive than wi-fi.
- ➔ **Similar pricing for wi-fi and internet kiosks.** This is the case in several large hubs.

- ➔ **Relatively cheap internet kiosks and expensive wi-fi.** This final strategy is adopted by several European and Asian airports which have decided to provide two levels of service in order to meet the needs of different passenger groups. These airports provide inexpensive internet kiosks for the more occasional internet users and medium to high-priced wi-fi for business passengers who are willing to pay a higher price if it guarantees a high quality wi-fi connection.

Wi-fi vs. internet kiosk price benchmark



Additional IT services

In addition to the airport wi-fi and internet kiosks many airports provide additional IT services. These include:

➤ Charging stations for electronic devices

Many airports offer charging stations so that passengers can recharge their mobile devices (laptops, mobile phones, etc...). In most cases (91%) these are free of charge though some airports provide special "lockers" in which passengers can recharge their electronic devices for a fee.

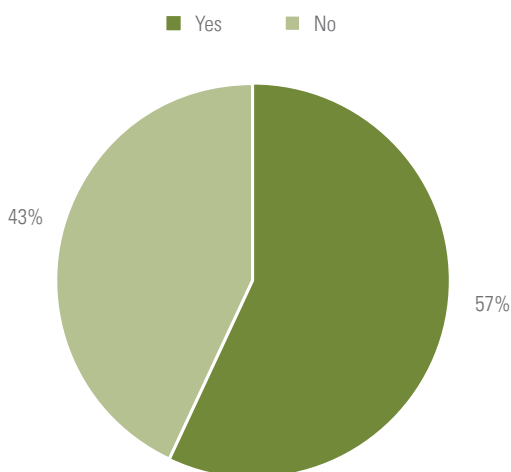
➤ Electrical plugs

Airports without special charging stations generally provide electrical plugs which passengers can use to recharge their devices. Some airports have specially marked "hot seats" in the gate areas which indicate that there is a plug located in the seat.

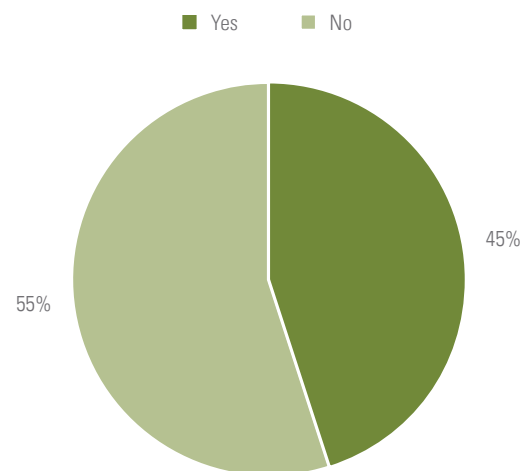
➤ Desk / working area for laptop users

Many airports also provide special desk areas for laptop users. These desk areas generally include electrical plugs and aim to provide business passengers with a suitable work environment.

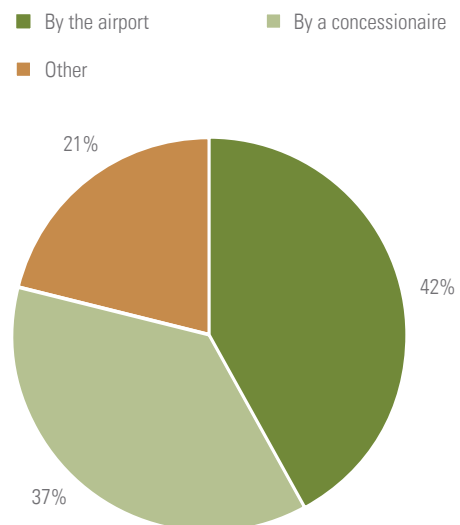
Does your airport provide desk / working areas for laptop users?



Does your airport provide charging stations for electronic devices?



Charging stations are managed...





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