How satisfied are Australian and New Zealand travellers with their airports?

2025 Traveller Sentiment Report

August 2025 | V1.0

'25

About Prescient Research

Since 2021, Prescient Research has been tracking the performance of Australian and New Zealand airports through traveller sentiment. During this time, we have collected over 4058 individual responses directly from travellers.

4058 Responses

28 Airports

7-minute Duration

About this report

This report presents and analyses paid responses from a international sample comparing 28 airports across Australia and New Zealand in 2024 and 2025. The insights uncover how travellers experience airports, and what could be actioned to increase their sentiment, spend, visitation and advocacy in the future.

Wondering how your airports compare?

Prescient Research can offer individual airport performance insights. Simply reach out to us and we will arrange a private presentation with your team.
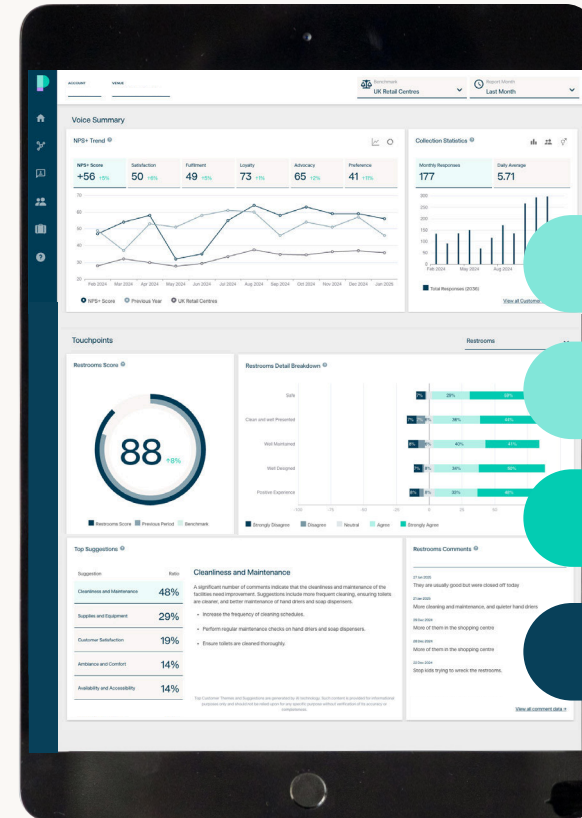
www.prescient.properties

Methodology

Prescient Research has been collecting paid responses from travellers of airports since 2021. These responses have been gathered from across Australia and New Zealand through four different paid online panels which are ISO 20252 compliant. To ensure the respondent provides accurate information, they need to have visited the nominated airport within the last month.

Prescient Research turns traveller sentiment into strategic action.

Prescient Voice is more than a sentiment tool – it's a system for real-time feedback, continuous improvement and measurable impact.

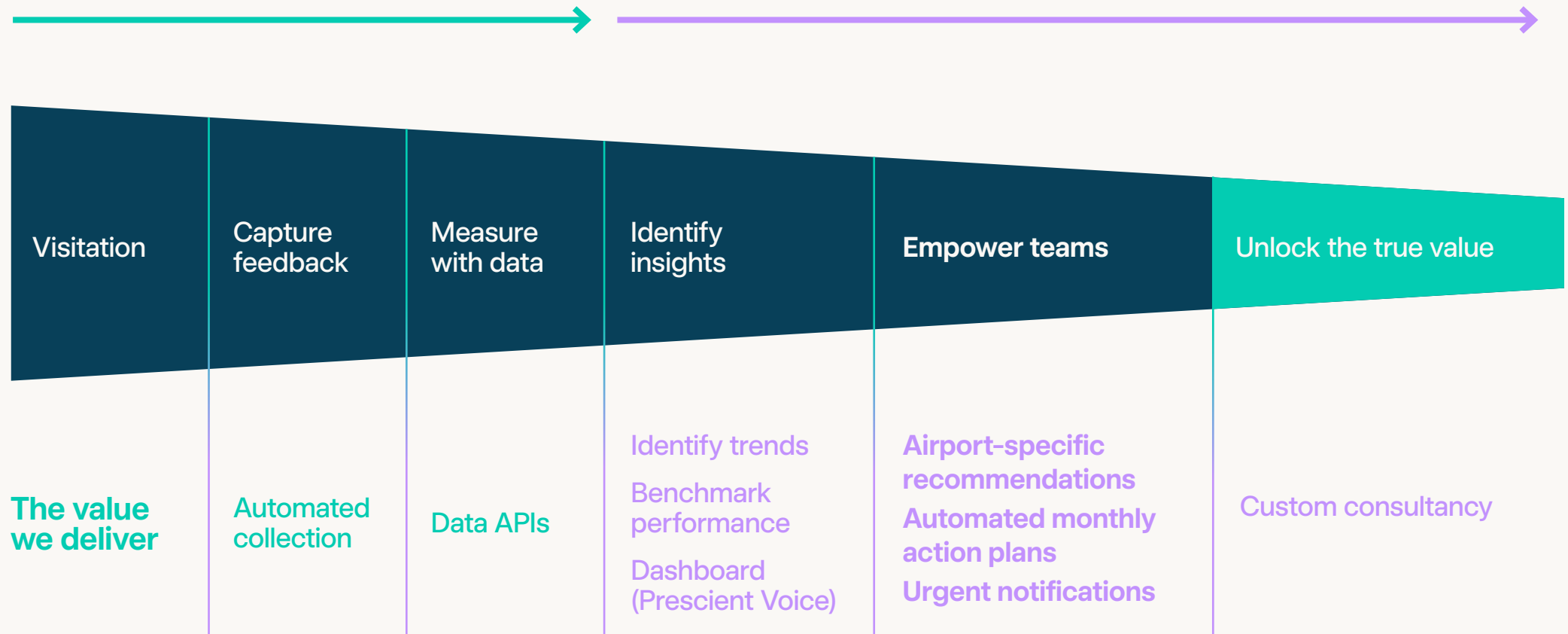We make the link between satisfaction and return on investment clear, measurable and actionable.

Measure satisfaction

Make changes

Improve satisfaction

Financial returns

Others only measure.   We unlock results.

Visitation	Capture feedback	Measure with data	Identify insights	Empower teams	Unlock the true value
The value we deliver	Automated collection	Data APIs	Identify trends Benchmark performance Dashboard (Prescient Voice)	Airport-specific recommendations Automated monthly action plans Urgent notifications	Custom consultancy

Case Study:
Major Australian airport.

Commencing collection in 2021, Prescient Research services have been implemented across Australia's leading airport.

The evidence.

Over the three years of measuring traveller sentiment, the airport-wide increase in sentiment is 5%, which equates to a significant change considering that our research quantifies 1% change at just under $30 in increased spend. Based on our research this 5% increase equates to a potential increase in spend in the hundreds of millions over this five-year period.

**3 terminals
164,000 sqm**

**29,320
Traveller responses**

**7459
Improvement suggestions**

**12,498
Competitor NPS+ Collected**

**+5%
Sentiment improvement over 3 years**

NPS+ top reported metric

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01

Executive summary
Topline insights

Definitions

The following definitions are used throughout this report:

AIRPORT SIZES

01

Small Airports

Airports with fewer than 5 gates.

02

Medium Airports

Airports with 5-10 gates.

03

Large Airports

Airports with 11 or more gates.

04

Capital City Airports

Airports located in capital cities of Australia and New Zealand.

AIRPORT LOCATIONS

05

Australian Airports

Airports located in Australia.

06

New Zealand Airports

Airports located in New Zealand.

COMPARISON GROUPS

07

International Airports

Select international airports including LAX, Haneda, Changi and Incheon.

08

Regional Airports

Airports located in regional (non-capital city) locations.

Executive summary

Australian and New Zealand airport sentiment

01

Traveller sentiment remains stable, but aspirations are unmet.

Airports across the region are broadly liked, but not always loved. While most travellers report satisfying experiences, fewer believe their expectations were exceeded. The average NPS+ score of +21 highlights this middle ground – a steady performance, but one that lacks the standout experiences required to drive exceptional advocacy.

02

Regional and small airports outperform expectations.

Smaller and regional airports are over-indexing in traveller sentiment, often outperforming larger, capital city counterparts. Smaller footprints, easier navigation and more personalised service are helping these locations create positive impressions. Regional airports achieved an NPS+ of +27 compared to just +11 in capital cities.

03

High sentiment equals higher spend.

For every 1% increase in traveller sentiment, spend per trip increases by $29.41. This direct link between emotional experience and financial outcome positions sentiment as a commercial performance metric – not just a 'soft' indicator. Increasing satisfaction is not just good for brand – it drives returns.

Executive summary

Opportunities for improved sentiment

04

Wayfinding, check-in and terminal transfers are key drivers.

Regression analysis shows that three operational touchpoints – wayfinding, check-in and terminal transfers – have the strongest relationship with overall traveller sentiment. Prioritising improvements here is the clearest way to lift the overall experience.

05

Food, seating and parking present the biggest opportunities.

The lowest-scoring touchpoints remain food and beverage, seating areas and parking. Traveller feedback suggests these are hindered by issues of variety, comfort, pricing, cleanliness and availability. Addressing these functional basics could unlock significant gains in sentiment.

06

Accessibility is a growing concern.

Travellers with mobility, sensory or cognitive challenges continue to report systemic gaps in access and service – from excessive walking distances to insufficient staff training. Addressing accessibility challenges isn't just a compliance issue – it's a customer experience imperative.
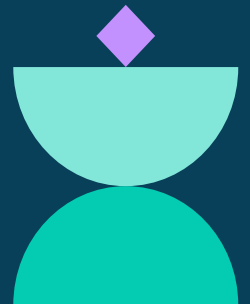
02

How happy are travellers with their airports?

Traveller satisfaction with Australian and New Zealand airports remains strong, yet the data indicates that many shoppers feel their expectations are not fully met.

The NPS+ metric indicates that while shoppers are generally satisfied, fewer feel their visit exceeded expectations. This highlights a gap between experience and aspiration, which landlords must address to retain and grow advocacy.

Encouragingly, loyalty remains high, with the majority of travellers intending to return. The challenge for airports is to differentiate their offering, ensuring travellers see their preferred destination as better than the competition.
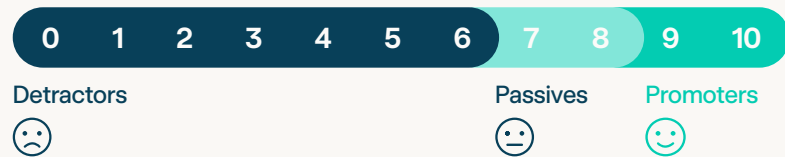
How do we measure sentiment?

Net Promoter Score+ (NPS+) is a methodology developed by Prescient Research – tailored to suit airports and physical places.

NPS+ measures more than a likelihood to recommend. It includes traveller satisfaction, their level of preference and loyalty and whether travellers view an airport as better than its competitors.

Combined, these scores form the NPS+ metric, offering a holistic measure of satisfaction designed specifically for physical places.

NPS+ Score = % Promoters − % Detractors

0	1	2	3	4	5	6	7	8	9	10

Detractors   Passives   Promoters

NPS+ is expressed as a figure from −100 to +100

A **negative** score signifies there are more detractors than promoters.

A **positive** score signifies there are more promoters than detractors.

NPS+ Traveller Sentiment Metrics

CSAT (Traveller SATISFACTION)

Satisfaction

My most recent experience was satisfying.

TRADITIONAL NET PROMOTER SCORE (NPS)

Advocacy

I am likely to recommend [airport] to family, friends and colleagues.

NPS (Net Promoter Score) measures the percentage of travellers rating their likelihood to recommend a company, a product or a service to a friend or colleague. This measure was designed for fast-moving consumer goods by management consultancy Bain and Company.

+ SENTIMENT METRICS FOR PLACES

Fulfilment

My most recent experience met my expectations.

Loyalty

I look forward to travelling through [airport] again in the future.

Preference

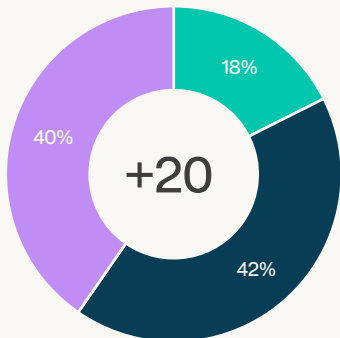I think my experience at [airport] was better than other airports.

What is the sentiment of Australian and NZ travellers with their airports?

Traveller sentiment is solid across the region, but few experiences exceed expectations or build strong emotional loyalty.

While most Australian and New Zealand travellers are satisfied with their airport experience, only a minority feel it is better than alternatives.

International and New Zealand airports outperform others, but capital city airports lag. The challenge now is not meeting expectations – but exceeding them.

2024 Benchmark   +20

2021 Benchma   +23

0–6   7–8   9–10   0–6   7–8   9

2025 Benchmark
18%
42%
40%
+20

2021 Benchmark
21%
39%
41%
+23

Australian Airports
21%
44%
35%
+14

New Zealand Airports
13%
43%
45%
+32

International Airports
8%
47%
45%
+37

■ 0–6   ■ 7–8   ■ 9–10

What is the sentiment of Australian and NZ travellers with their airports?

There is a clear hierarchy in performance with the chosen international airports performing the best, then New Zealand airports then Australian airports.

The strongest performing aspect of the five NPS+ statements is traditional NPS (Advocacy), whilst the lowest perfoming is 'Preference' – better than other airports.

New Zealand airports outperform Australian airports in all five metrics.

NPS+ Statements 2025

Legend: ■ 0-6   ■ 7-8   ■ 9-10

Statement	Description		0-6	7-8	9-10	Mean Score (out of 10)	NPS Score (out of 200)
Satisfaction	My most recent experience was satisfying.	Australian Airports	16%	49%	34%	7.8	18
		New Zealand Airport	10%	50%	40%	8.0	30
		International Airport	5%	53%	42%	8.2	37
Fulfilment	My most recent experience met my expectations.	Australian Airports	19%	45%	36%	7.7	17
		New Zealand Airport	13%	39%	48%	8.1	35
		International Airport	9%	46%	45%	8.2	36
Preference	I think my experience at [airport] was better than other airports.	Australian Airports	28%	43%	30%	7.3	2
		New Zealand Airport	15%	46%	39%	7.9	24
		International Airport	10%	47%	43%	8.1	33
Loyalty	I look forward to travelling through [airport] again in the future.	Australian Airports	21%	43%	36%	7.7	15
		New Zealand Airport	14%	39%	47%	8.1	33
		International Airport	9%	45%	46%	8.2	37
Advocacy	I am likely to recommend [airport] to family, friends and colleagues.	Australian Airports	22%	39%	39%	7.7	17
		New Zealand Airport	11%	40%	49%	8.1	38
		International Airport	8%	42%	50%	8.3	42

What is the sentiment of Australian and NZ travellers with their airports?

Surprisingly, smaller regional airports tend to outperform their capital city counterparts.

This can be explained by the Size–Prestige Heuristic, which suggests that larger airports carry higher expectations in the minds of travellers.

As a result, Capital City airports are often judged more harshly. In contrast, regional airports benefit from lower passenger volumes, smoother traveller flow and less pressure on facilities – leading to a more positively perceived experience overall.

NPS+ Statements 2025

Legend: ■ 0–6   ■ 7–8   ■ 9–10

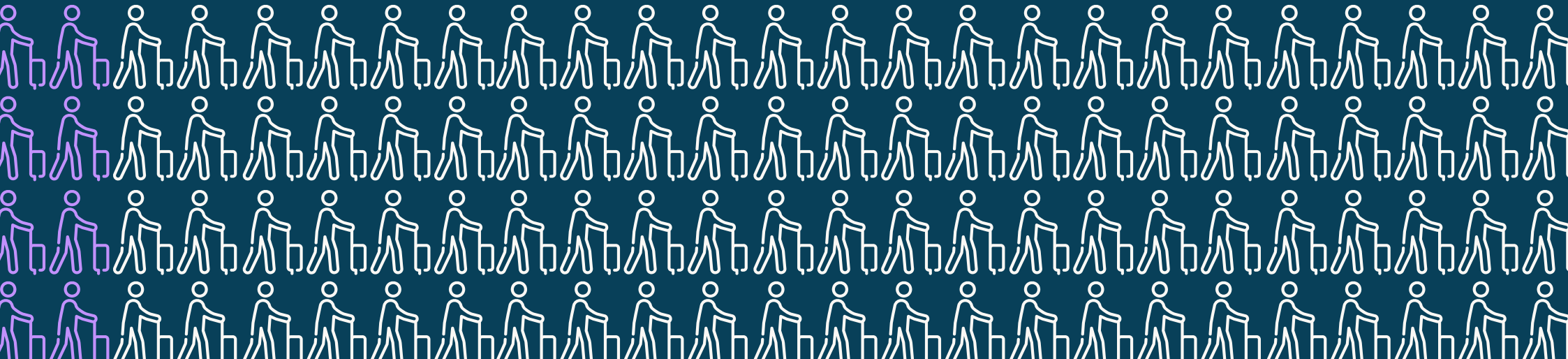| Statement	Description	Segment	0–6	7–8	9–10	Mean Score (out of 10)	NPS Score (out of 200)
Satisfaction	My most recent experience was satisfying.	Capital Cities	17%	51%	32%	7.7	15
		Regional	12%	45%	43%	8.1	31
Fulfilment	My most recent experience met my expectations.	Capital Cities	19%	46%	35%	7.7	16
		Regional	14%	44%	42%	8.0	28
Preference	I think my experience at [airport] was better than other airports.	Capital Cities	29%	43%	28%	7.3	-1
		Regional	19%	43%	38%	7.7	19
Loyalty	I look forward to travelling through [airport] again in the future.	Capital Cities	22%	43%	35%	7.6	13
		Regional	14%	44%	41%	8.0	27
Advocacy	I am likely to recommend [airport] to family, friends and colleagues.	Capital Cities	23%	40%	37%	7.6	14
		Regional	15%	41%	44%	8.0	29

The main opportunity lies in understanding how we can better fulfil travellers across airport types.

Only 12% of travellers at large Australian capital city airports are completely fulfilled (scoring 10/10). For small regional airports, the number is only marginally higher at 15%.

This leaves a significant opportunity: more than 85% of travellers are not fully fulfilled. The challenge is clear — how might we deliver an experience that completely meets their needs, regardless of airport type?
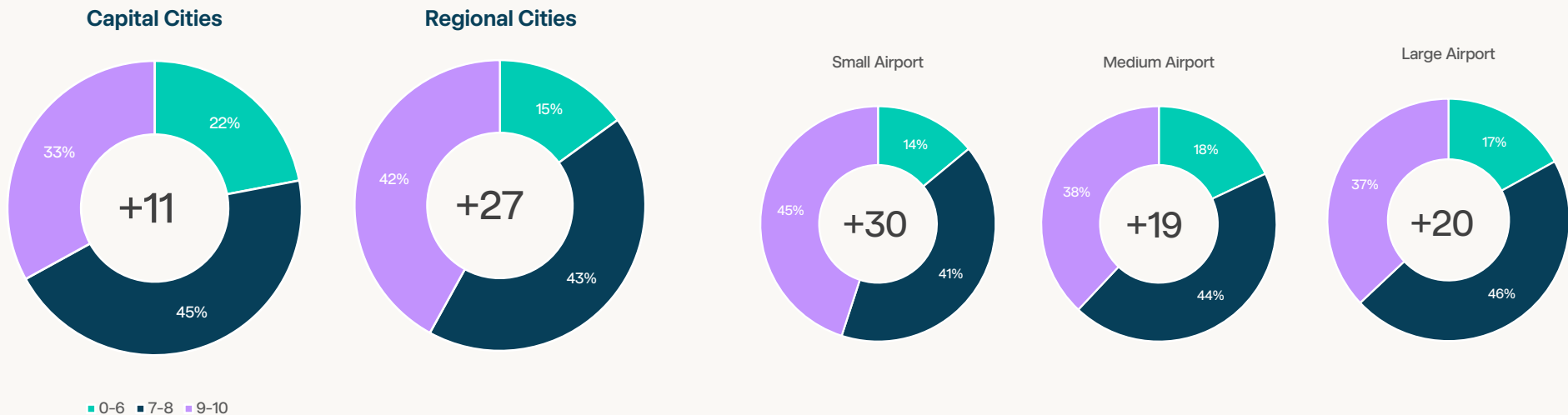
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What is the sentiment of Australian and NZ travellers with their airports?

Further evidence of the Size–Prestige Heuristic is seen in the strong performance of Small airports, which scored +30.

In comparison, Medium (+19) and Large airports (+20) performed similarly, despite their greater scale. When examining the distribution of scores, Small airports stand out: nearly half of all travellers rated their experience a 9 or 10 out of 10, while only 1 in 8 gave a rating of 6 or below.

This consistency reinforces the idea that lower expectations – and fewer operational pressures – can lead to higher satisfaction.

+27   +27   +27

Australian Regional   Australian Regional   Australian Regional

Australian Capital Cities   Australian Capital Cities   Australian Capital Cities

+11   +11   +11

0-6 7-8 9-10   0-6 7-8 9-10   0-6 7-8 9-10   0-6 7-8 9-10   0-6 7-8 9-10

Australian Regional

Capital Cities

+11

- 22% (0-6)
- 45% (7-8)
- 33% (9-10)

Regional Cities

+27

- 15%
- 43%
- 42%

Small Airport   Small Airport   Small Airport

+30   +30   +30

- 14%
- 41%
- 45%

Medium Airport   Medium Airport   Medium Airport

+19   +19   +19

- 18%
- 44%
- 38%

Large Airport   Large Airport   Large Airport

+20   +20   +20

- 17%
- 46%
- 37%

Legend: ■ 0-6 ■ 7-8 ■ 9-10

Small Airport   Medium Airport   Large Airport   Medium Airport   Large Airport

0-6 7-8 9-10   0-6 7-8 9-10   0-6 7-8 9-10   0-6 7-8 9-10

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What is the sentiment of Australian and NZ travellers with their airports?

Small airports lead on every sentiment measure – scoring higher in Satisfaction, Fulfilment, Intention and Advocacy.

Their NPS scores are notably stronger, especially for Satisfaction (+32) and Advocacy (+33). This reflects the benefits of simpler, less congested environments and more relaxed traveller experiences.

Medium and Large airports, by contrast, perform similarly – suggesting scale alone doesn't drive better sentiment and may even work against it when expectations aren't met.

NPS+ Statements 2025

Legend: ■ 0–6   ■ 7–8   ■ 9–10

Statement		Airport	0–6	7–8	9–10	Mean Score (out of 10)	NPS Score (out of 200)
Satisfaction	My most recent experience was satisfying.	Small Airport	11%	46%	43%	8.1	32
		Medium Airport	14%	49%	37%	7.9	23
		Large Airport	13%	52%	35%	7.9	22
Fulfilment	My most recent experience met my expectations.	Small Airport	14%	40%	45%	8.1	31
		Medium Airport	16%	45%	39%	7.9	23
		Large Airport	16%	46%	38%	7.9	22
Preference	I think my experience at [airport] was better than other airports.	Small Airport	18%	41%	42%	7.8	24
		Medium Airport	24%	44%	32%	7.5	8
		Large Airport	22%	45%	33%	7.6	11
Loyalty	I look forward to travelling through [airport] again in the future.	Small Airport	15%	39%	46%	8.0	31
		Medium Airport	19%	43%	38%	7.8	19
		Large Airport	18%	43%	39%	7.8	21
Advocacy	I am likely to recommend [airport] to family, friends and colleagues.	Small Airport	14%	39%	47%	8.1	33
		Medium Airport	19%	38%	43%	7.8	24
		Large Airport	18%	42%	41%	7.8	23

Positively, Small Airport travellers indicate the strongest levels of 'Advocacy' – intention to recommend (8.1/10 Mean Score).
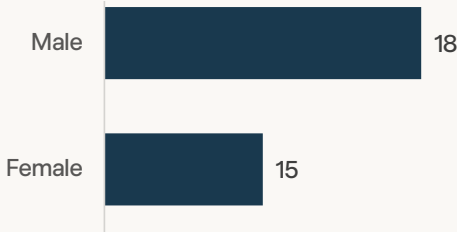
However, Capital City Airport travellers are the most likely to have low 'Preference' – better than other airports (7.3/10 Mean Score).
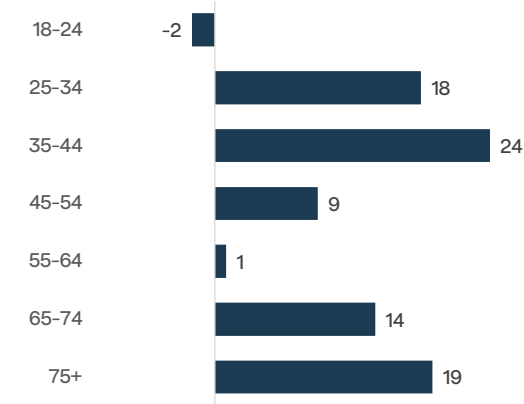
How does sentiment differ by demographics?

Airport sentiment varies across demographic lines. Older travellers report higher satisfaction, with NPS+ peaking among those aged 35-44 and 75+. Younger adults (18-24) are the least positive, returning a negative score (-2).

Living situation has a strong influence: those in family-based households, especially couples living with family or friends (+38), tend to report stronger sentiment, while people living alone score significantly lower (-5). Sentiment also improves with income, rising steadily from +1 (under $50k) to +24 (over $150k), suggesting a link between financial comfort and travel experience.
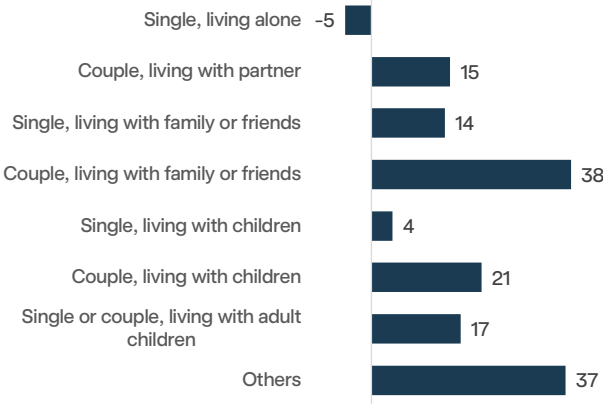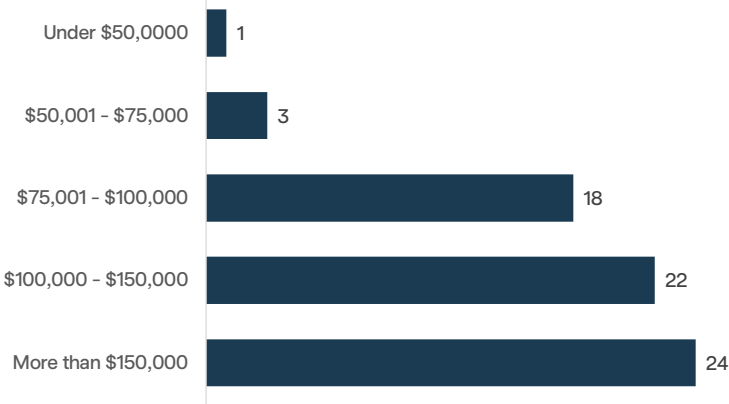
NPS+ by Gender

Gender	Score
Male	18
Female	15

NPS+ by Age

Age	Score
18-24	-2
25-34	18
35-44	24
45-54	9
55-64	1
65-74	14
75+	19

NPS+ by Living Situation

Living Situation	Score
Single, living alone	-5
Couple, living with partner	15
Single, living with family or friends	14
Couple, living with family or friends	38
Single, living with children	4
Couple, living with children	21
Single or couple, living with adult children	17
Others	37

NPS+ by Individual Income ($AUD per annum)

Income	Score
Under $50,0000	1
$50,001 - $75,000	3
$75,001 - $100,000	18
$100,000 - $150,000	22
More than $150,000	24

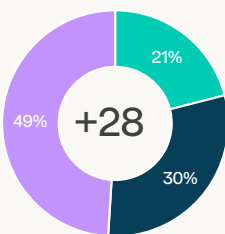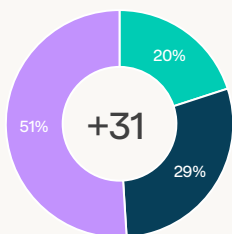# How does sentiment change by purpose of travel?

Travel purpose plays a clear role in shaping sentiment. Travellers on business trips report the highest satisfaction, with NPS+ scores reaching the mid to high 40s – especially when departing from Small or Regional airports.

Leisure and family visits show moderate sentiment, while those relocating tend to feel more mixed.

Surprisingly, travellers also report only a slightly higher sentiment when using a lounge, with a small lift in NPS+ (+31 vs +28). This brings into question the overall value of the lounge experience on traveller sentiment.

NPS+ by Purpose of Travel

Leisure Travel (Vacation / Holiday)
- Capital Cities: 16
- Regional Cities: 23
- Small Airports: 30
- Medium Airports: 22
- Large Airports: 23

Business Travel
- Capital Cities: 20
- Regional Cities: 45
- Small Airports: 46
- Medium Airports: 32
- Large Airports: 28

Travelling to visit Friends or Family
- Capital Cities: 15
- Regional Cities: 27
- Small Airports: 30
- Medium Airports: 24
- Large Airports: 20

Travelling for Education or Study
- Capital Cities: 16
- Regional Cities: 49
- Small Airports: 48
- Medium Airports: 30
- Large Airports: 27

Travelling to Relocate or Immigrate
- Capital Cities: 14
- Regional Cities: 45
- Small Airports: 48
- Medium Airports: 25
- Large Airports: 25

Not travelling
- Regional Cities: -40
- Small Airports: -40
- Medium Airports: 2
- Large Airports: 51

Legend: ■ Capital Cities ■ Regional Cities ■ Small Airports ■ Medium Airports ■ Large Airports

Yes, using lounge
+31
- 51% Endorsers
- 29% Passives
- 20% Detractors

■ 0–6 ■ 7–8 ■ 9–10

Yes

No, not using lounge
+28
- 49% Endorsers
- 30% Passives
- 21% Detractors

No

No– did not use Airport Lounge

+28
- 49% Endorsers
- 30% Passives
- 21% Detractors

0–6   7–8   9–10

No

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Top 3 Suggestions – by travellers with a disability

Mobility and Walking Distances

Passengers frequently reported challenges with mobility and walking distances, especially those with injuries or disabilities. Long walks, limited wheelchair access and a lack of lifts or ramps made navigation difficult. Suggested improvements included more visible mobility aids, rest areas and alternative transport like shuttle carts. One user noted: 'Only one lift from arrivals to departures.'

+31

Staff and Assistance

Issues with staff and assistance were also common. Travellers wearing sunflower lanyards or with invisible disabilities often felt ignored or misunderstood. Respondents suggested better disability training for staff and dedicated accessibility teams. One person shared: 'No one acknowledged my autistic daughter.'
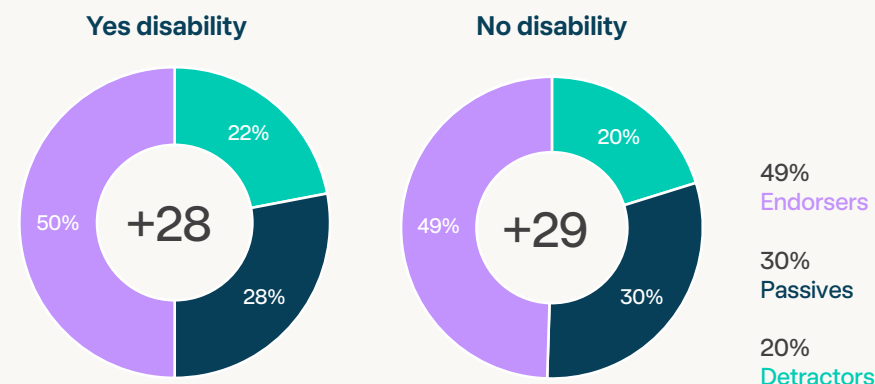
+28

Wait Times and Queues

Extended wait times and queues caused stress for those with limited stamina. Long waits without seating or assistance were especially hard. Suggestions included priority queuing, clearer communication and more support during delays. A traveller recalled: 'Waiting two hours for a wheelchair.'

+28

How does sentiment change for travellers with a disability?
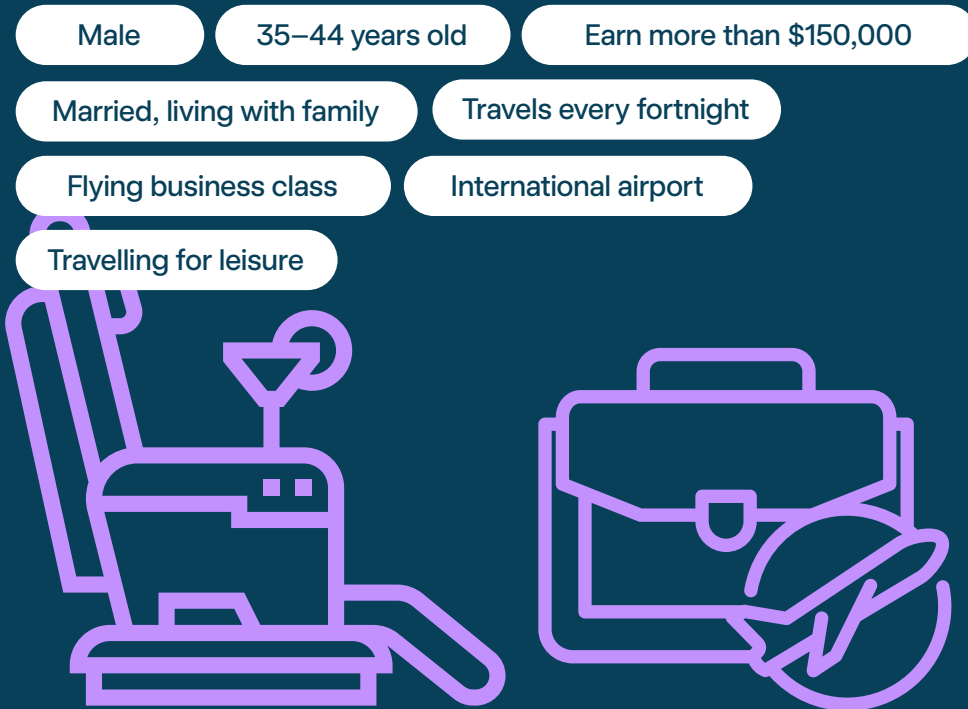
Sentiment among travellers with a disability is only slightly lower than those without – a difference of just one point (+28 vs +29).

However, this parity masks critical challenges. Feedback from travellers with disabilities highlights recurring barriers around mobility, staff support and wait times. While overall satisfaction remains relatively strong, the experiences shared suggest that more inclusive infrastructure and service design could meaningfully improve the journey for many.

Yes disability

+28

22%
50% Endorsers / 50%
28% Passives
22% Detractors

No disability

+29

20%
49% Endorsers / 49%
30% Passives
20% Detractors

Endorsers 49%
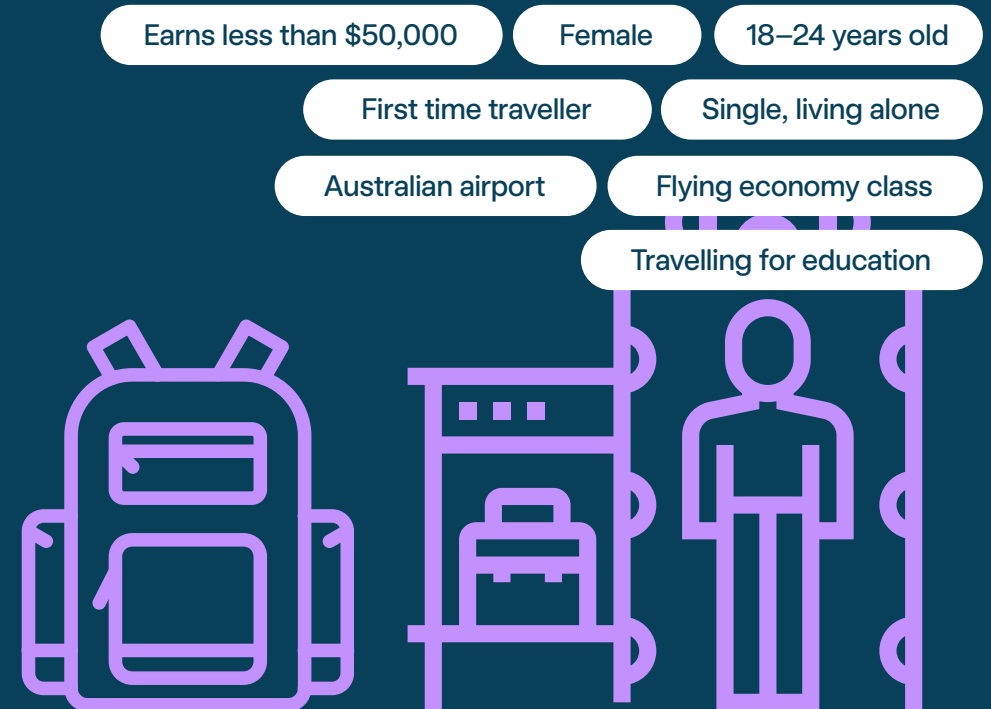Passives 30%
Detractors 20%

+29

Who is most likely to be the most satisfied traveller?

Travellers most likely to report high satisfaction tend to be males aged 35–44, travelling for leisure in business class, with incomes over $150,000. They are often part of a household with family or friends, depart from international or small airports, and travel frequently – every two to three weeks.

- Male
- 35–44 years old
- Earn more than $150,000
- Married, living with family
- Travels every fortnight
- Flying business class
- International airport
- Travelling for leisure

Who is most likely to be the least satisfied traveller?

Those least likely to report high satisfaction are typically females aged 18–24, travelling alone in economy class, with incomes under $50,000. They are more likely to be travelling for education or study, flying from a medium-sized airport, often on their first trip.

- Earns less than $50,000
- Female
- 18–24 years old
- First time traveller
- Single, living alone
- Australian airport
- Flying economy class
- Travelling for education
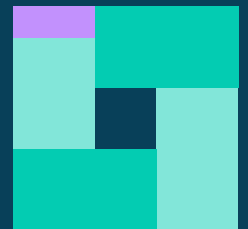
03

How valuable is traveller satisfaction?

The evidence is clear: more satisfied travellers spend more.

The most satisfied travellers are the biggest spenders – and spend data indicates an increase of $29.41 per trip for every 1% increase in satisfaction.

The most satisfied travellers are also the most regular visitors – the data indicates that the most satisfied travellers are those who travel fortnightly, while the least satisfied are those travelling for the 'first time'.

Airports that ascertain exactly what satisfies their travellers and invest accordingly are able to unlock increased loyalty and spend.
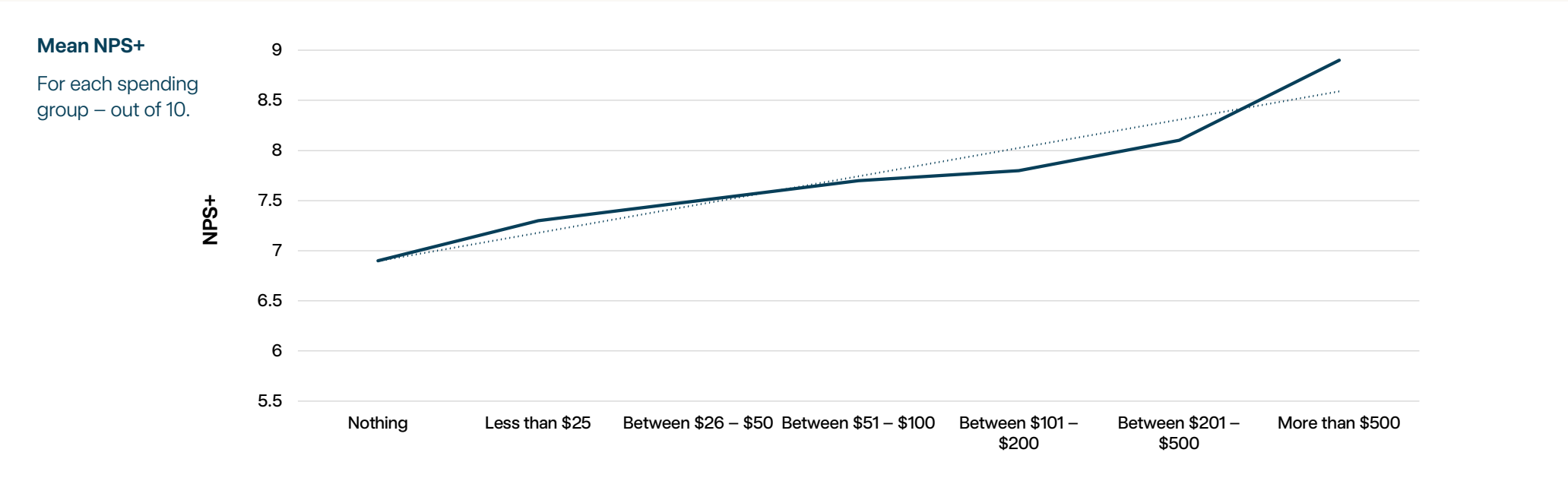
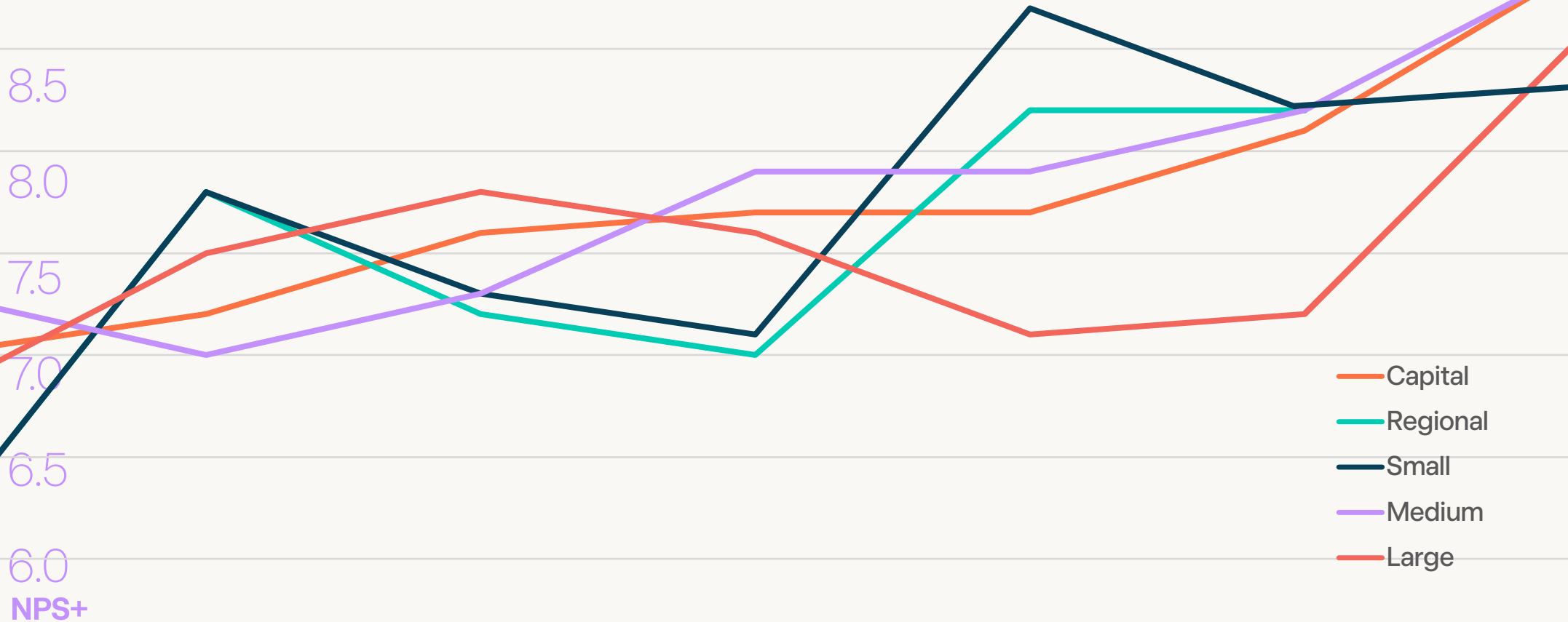# The data indicates that satisfaction and spend are strongly correlated.

The data indicates that traveller satisfaction and spend are strongly correlated.

As satisfaction (NPS+) increases, so does spend – sharply. Travellers who report higher satisfaction levels are significantly more likely to spend more within the terminal. The relationship is clear: for every 1% increase in NPS+, average spend rises by $29.41 per trip.

This highlights the commercial value of investing in experience – improving sentiment not only enhances traveller perception but directly supports greater spend per visit.

Mean NPS+

For each spending group – out of 10.

Regardless of airport type, a clear relationship between sentiment and spend exists.

NPS+

Capital
Regional
Small
Medium
Large

A 1% increase in sentiment equates to a $29.41 increase in spend. Therefore, any investment which improves the travellers' sentiment by 1%, and costs less than $29.41 per visitor to implement, should be viewed as a good investment.
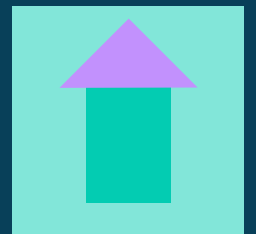
04

What factors are most related to sentiment?

We use linear regression to determine which touchpoints and themes most strongly relate to traveller sentiment.

Those factors that correlate more strongly could be interpreted as being more important for supporting a positive perception of the travellers' retail airport experience. Those with a weaker relationship to sentiment should not be viewed as unimportant. Rather, they are merely less likely to directly drive positive sentiment.
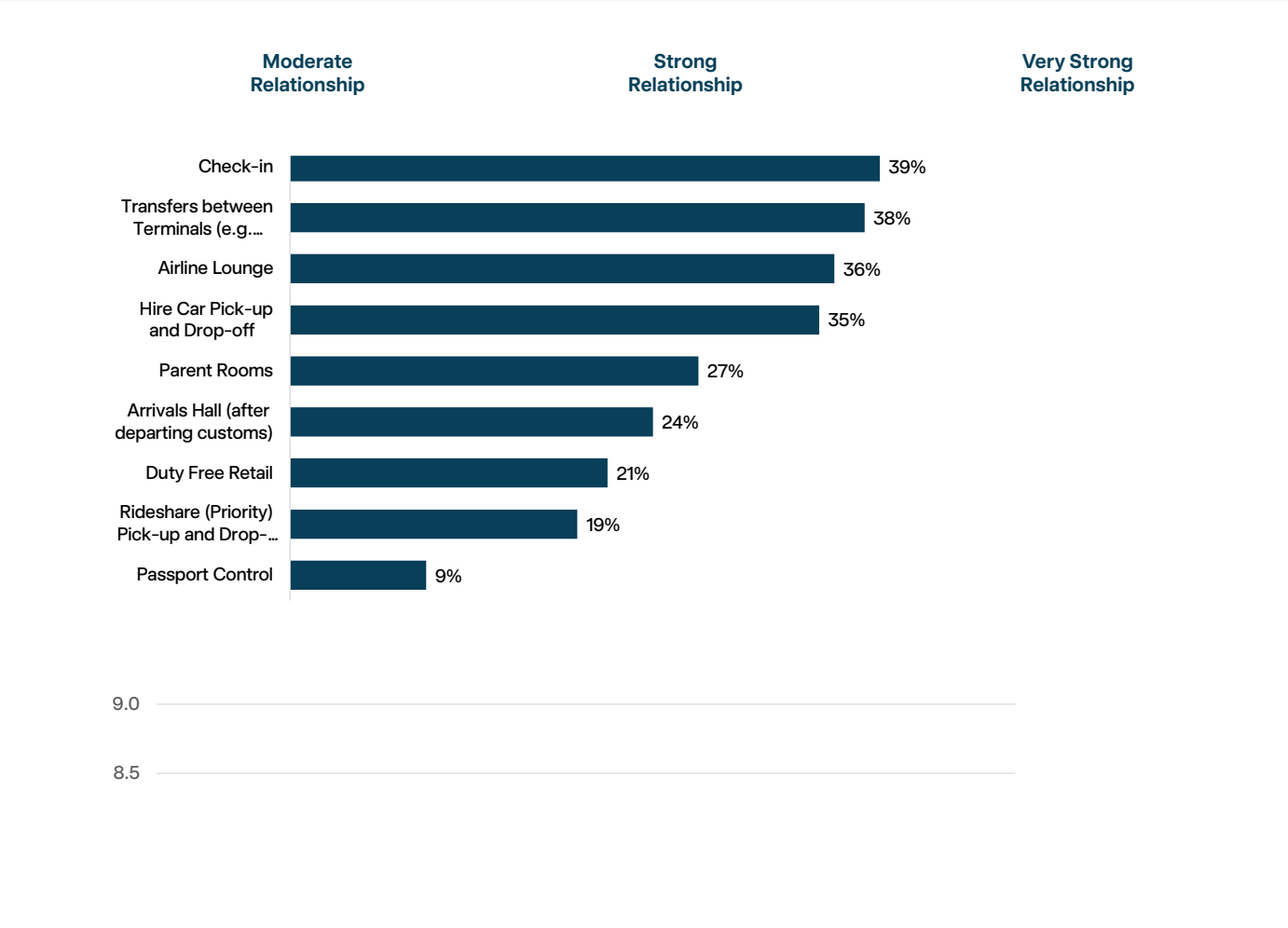
Which touchpoints drive positive sentiment?

Wayfinding, Check-in and Transfers between terminals have the strongest relationship with positive sentiment – meaning improvements in these areas are most likely to lift overall satisfaction. These touchpoints help shape the start and flow of the journey, making them critical to first impressions and ease of travel.

While most touchpoints show some relationship with sentiment, those involving clarity, orientation and control play the biggest role in shaping a positive experience. Investing here offers the greatest return in terms of traveller perception.

Linear regression is a statistical method that identifies the strength of the relationship between two variables – in this case, touchpoint scores and overall sentiment. It helps show how improvements in one area (like Wayfinding) are likely to influence overall traveller satisfaction, allowing airports to prioritise the changes that will have the biggest impact.

Strength of Relationship Between Touchpoints and Sentiment
(%age relationship between the touchpoint scores and NPS+)

	Moderate Relationship	Strong Relationship	Very Strong Relationship

Touchpoint	Value
Check-in	39%
Transfers between Terminals (e.g.…	38%
Airline Lounge	36%
Hire Car Pick-up and Drop-off	35%
Parent Rooms	27%
Arrivals Hall (after departing customs)	24%
Duty Free Retail	21%
Rideshare (Priority) Pick-up and Drop-…	19%
Passport Control	9%

9.0

8.5

The importance of great wayfinding

Our research suggests that if your travellers are happy with the wayfinding and directions it is highly likely they will have a **positive sentiment towards the overall airport.**
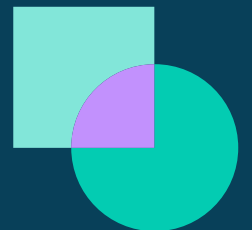
05

How do airport touchpoints perform?

Touchpoints are distinct elements of the airport experience within the traveller journey. In addition to asking about the sentiment, we also ask about the performance of specific 'touchpoints'.

The results provide an indication of those aspects of the experience which are performing well and those which are not. These insights empower you to identify strengths and address any weaknesses within the traveller experience.

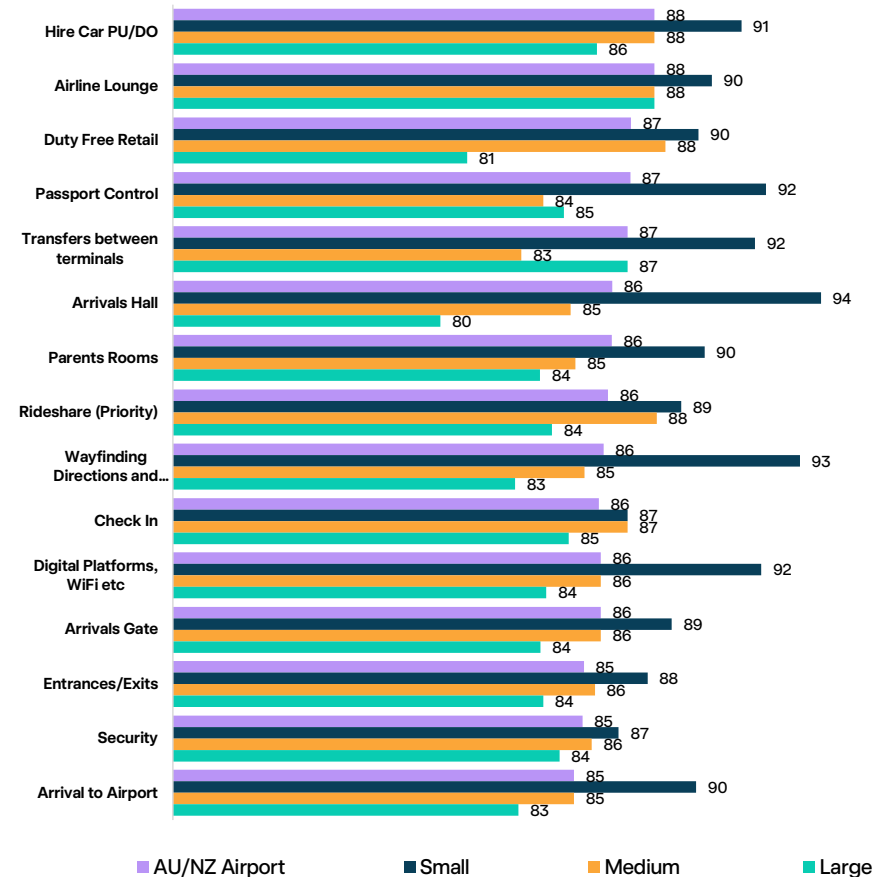# How do individual touchpoints perform with travellers?

The highest-rated touchpoints reflect areas where airports are getting the basics right – ease, clarity and control.

Travellers are most satisfied with experiences like Passport Control, Arrivals Halls, Check-in and Wayfinding, all scoring above 90 at the best-performing airports. Small and Medium airports consistently lead in these areas, delivering smoother handovers and more predictable journeys.
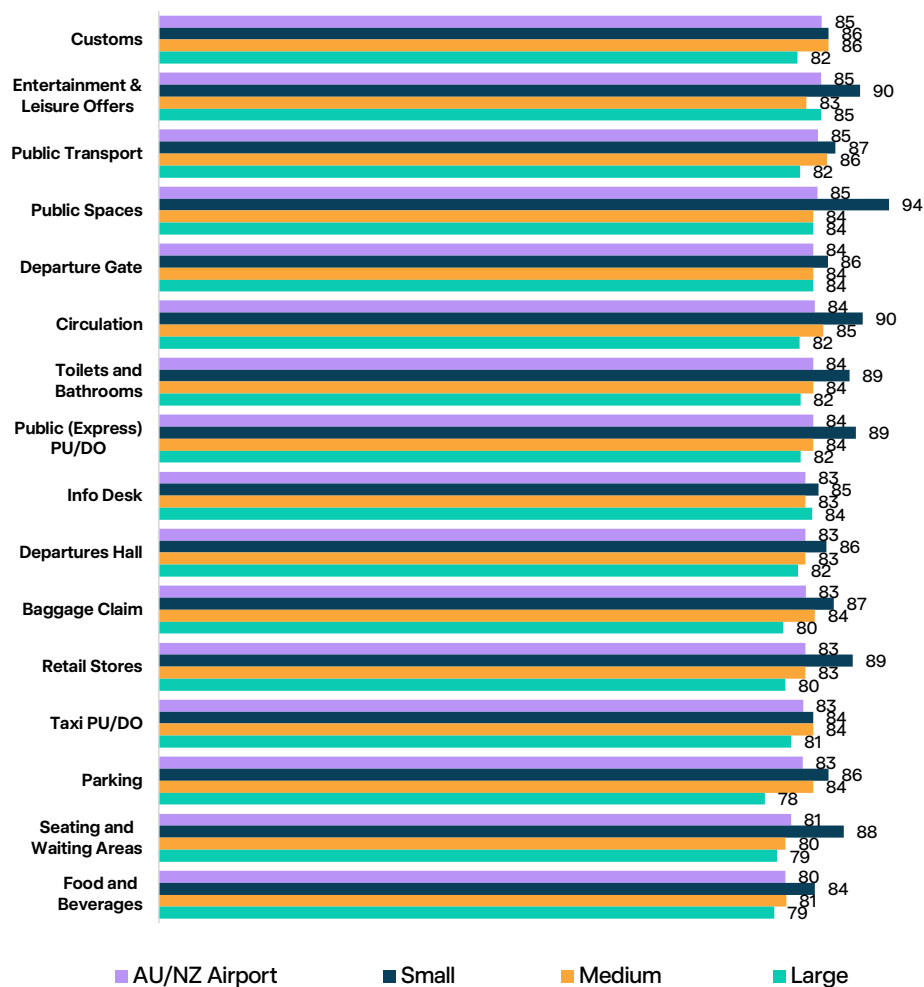
The Size-Prestige Heuristic is a cognitive shortcut where consumers perceive larger places as better, more valuable and prestigious, assuming greater size means higher quality and superior offerings.
These much higher expectations of Large airports can be harder to meet, hence the lower satisfaction with key touchpoints.

Touchpoint Performance – Top 50% (out of 100)

Touchpoint	AU/NZ Airport	Small	Medium	Large
Hire Car PU/DO	88	91	88	86
Airline Lounge	88	90	88	
Duty Free Retail	87	90	88	81
Passport Control	87	92	84	85
Transfers between terminals	87	92	83	87
Arrivals Hall	86	94	85	80
Parents Rooms	86	90	84	85
Rideshare (Priority)	86	89	88	84
Wayfinding Directions and…	86	93	85	83
Check In	86	87	87	85
Digital Platforms, WiFi etc	86	92	86	84
Arrivals Gate	86	89	86	84
Entrances/Exits	85	88	86	84
Security	85	87	86	84
Arrival to Airport	85	90	85	83

■ AU/NZ Airport   ■ Small   ■ Medium   ■ Large

Touchpoint Performance – Bottom 50% (out of 100)

Customs — 85, 86, 86, 82
Entertainment & Leisure Offers — 85, 90, 83, 85
Public Transport — 85, 87, 86, 82
Public Spaces — 85, 94, 84, 84
Departure Gate — 84, 86, 84, 84
Circulation — 84, 90, 85, 82
Toilets and Bathrooms — 84, 89, 84, 82
Public (Express) PU/DO — 84, 89, 84, 82
Info Desk — 83, 85, 83, 84
Departures Hall — 83, 86, 83, 82
Baggage Claim — 83, 87, 84, 80
Retail Stores — 83, 89, 83, 80
Taxi PU/DO — 83, 84, 84, 81
Parking — 83, 86, 84, 78
Seating and Waiting Areas — 81, 88, 80, 79
Food and Beverages — 80, 84, 81, 79

Legend: AU/NZ Airport, Small, Medium, Large

How do individual touchpoints perform with travellers?

The lower-rated touchpoints often relate to comfort, convenience and amenities – including Food & Beverage, Seating, Parking and Retail.

While still scoring in the 80s, these areas leave more room for improvement, particularly at larger airports where expectations are highest.

The Size–Prestige Heuristic helps explain this pattern: travellers expect more from bigger, busier terminals. When offerings feel crowded, confusing or underwhelming, satisfaction suffers. By contrast, smaller airports with simpler layouts and shorter queues tend to exceed expectations – creating more memorable and positive passenger experiences.

How could airports improve the experience for the lowest scoring touchpoints?

The themes below have been distilled from individual comments asking travellers to provide improvement feedback.

Food and Bev

Food and Variety of Options

Introduce a wider selection of dining options, including fresh and premium food choices, to cater to diverse preferences. Consider adding more vegetarian-friendly and speciality food vendors.

Pricing Concerns

Introduce more budget-friendly food and drink options while maintaining quality. Consider offering meal deals or discounts to improve affordability.

Cleanliness and Environment

Enhance cleaning routines and implement better ventilation systems to prevent strong food odours from mixing. Ensure facilities are well maintained for an improved dining experience.

Seating Areas

Seating Comfort and Availability

Upgrade seating with ergonomic designs and cushioning while increasing the number of available seats to reduce overcrowding.

Facilities and Amenities in Seating Areas

Install more charging stations and consider adding entertainment features like books, projection screens or designated kid-friendly areas.

Space and Cleanliness

Implement clearer signage to discourage baggage placement on seats and maintain regular cleaning to ensure hygiene.

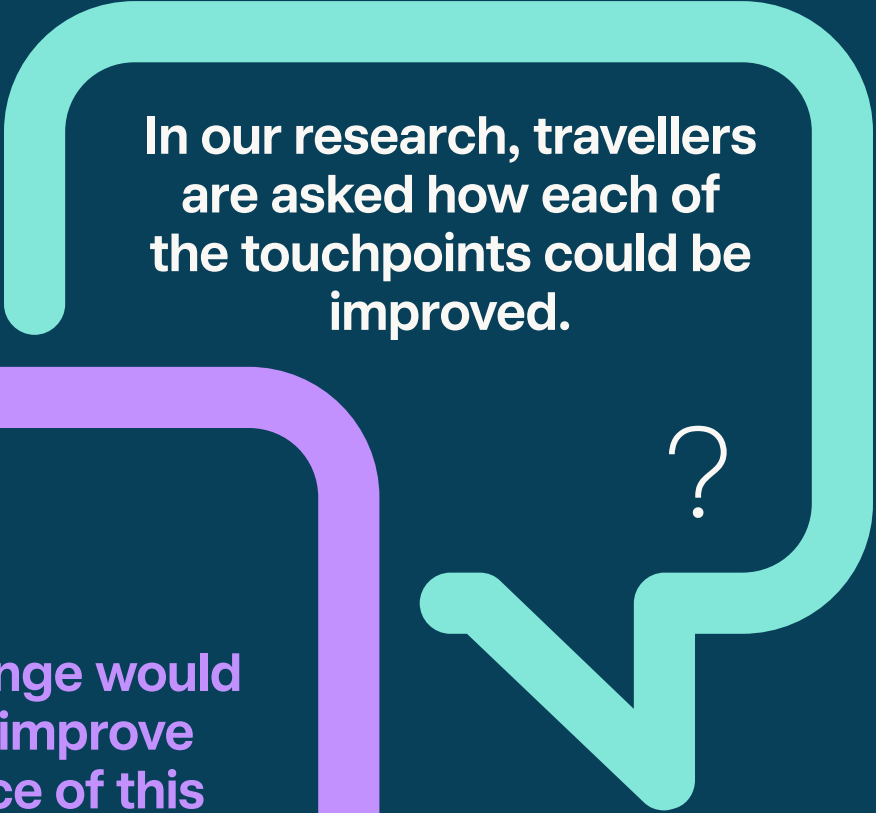## Parking

Parking Availability and Expansion

Many shoppers highlighted the need for more parking spaces, including underground parking and closer access to key areas like the terminal. Some also suggested better parking layouts for efficiency.

Parking Pricing and Affordability

Introduce lower-cost parking options and consider implementing short-term free parking for quick drop-offs and pick-ups.

Signage and Navigation

Improve directional signage and provide real-time parking availability updates through digital displays or apps to enhance navigation.

In our research, travellers are asked how each of the touchpoints could be improved.

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'What one change would you make to improve the experience of this touchpoint?'

Prescient

What one change would you make to improve the airport experience?

The top three themes below have been distilled from individual comments asking travellers to provide improvement feedback.

Food Variety and Pricing

Many passengers expressed dissatisfaction with the limited food options and high prices in airport outlets, calling for more affordable, diverse and healthy choices.

They highlighted a lack of international and local offerings, and noted that current menus did not cater well to varied budgets or dietary needs. Comments included 'More food options and cheaper prices,' 'I would provide more diverse and reasonably priced dining options to meet the tastes and budgets of different passengers,' and 'Make the food places cheaper and healthier.'

Queues and Wait Times

Passengers voiced strong concerns about excessive waiting times at check-in, security and baggage claim, often suggesting automation and improved queue management to ease congestion.

Many called for more self-service options, real-time updates and biometric screening to streamline the process and reduce bottlenecks. Sample feedback included 'Try and reduce the waiting on line time,' 'I would implement a streamlined digital check-in and security process, allowing passengers to pre-book time slots,' and 'Reduce the amount of waiting time for checking to boarding.'

Navigation and Wayfinding

Several travellers reported difficulty navigating the airport due to unclear or insufficient signage, which led to confusion and added stress.

They suggested better layout design, larger and multilingual signs, and mobile-based wayfinding support to enhance clarity and ease of movement. This was reflected in comments such as 'Making signs clearer to understand where to go as it can be very confusing and frustrating,' 'Improve airport signage, daily convenience stores and convenience food offerings,' and 'The interior of the airport should be cleaned better and the route signs should be bigger and clearer.'

What are experience themes?

In addition to answering questions about touchpoint performance, travellers are also asked about experiential themes. Unlike touchpoints, these six themes are present across the traveller experience.

Cleanliness

ENTRANCEWAYS – RESTROOMS – FAMILY ROOMS – FOOD AREAS

The touchpoint is clean and well presented.

Design

SEATING AREAS – RESTROOMS – FAMILY ROOMS – FOOD AREAS

The touchpoint is well designed and suited to my needs.

Maintenance

SEATING AREAS – ENTRANCEWAYS – RESTROOMS

The touchpoint is well maintained and in good working order.

Experience

GUEST SERVICES – DIGITAL SERVICES – INSIDE STORES

The touchpoint provides a positive experience.

Efficiency

CHECK-IN – SECURITY – BAGGAGE

The touchpoint is fast and easy.

Navigation

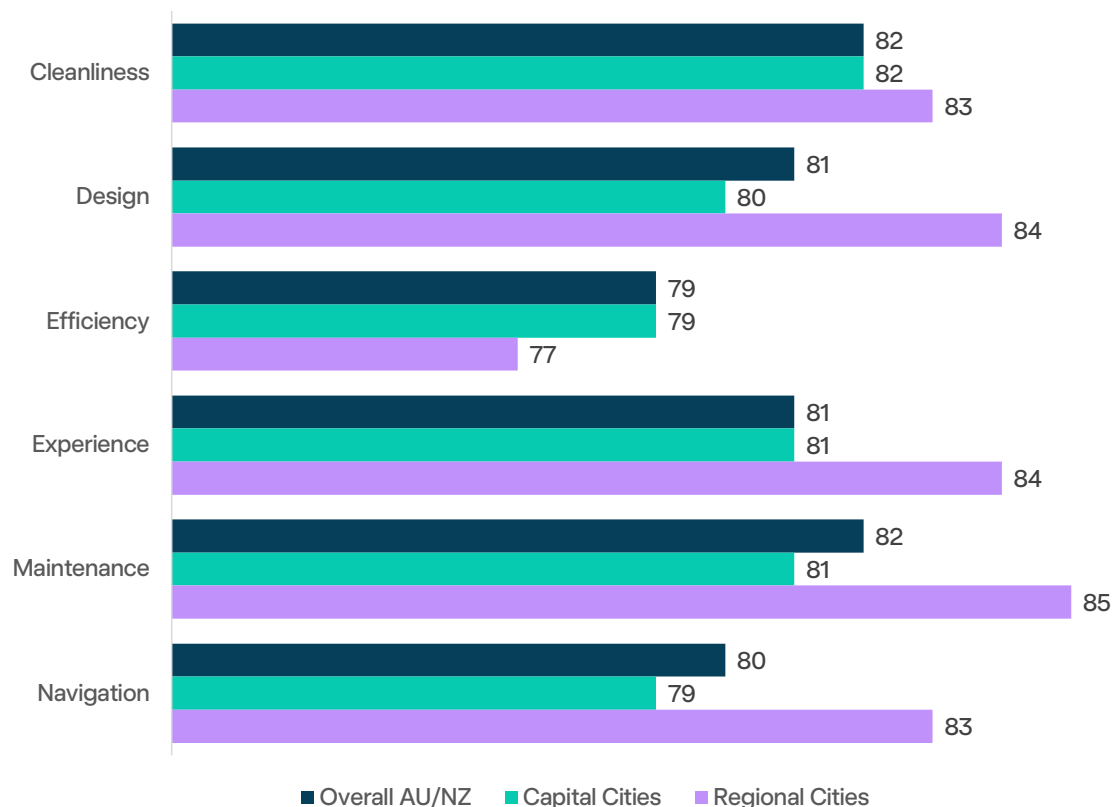**CHECK-IN – CIRCULATION – DEPARTURE GATE**

The touchpoint is clear and well signposted.

How do the airports perform across the six themes?

Across all six themes, Regional airports outperform Capital City airports, with the biggest gaps seen in Navigation (+4), Maintenance (+4) and Efficiency (+2).

While satisfaction is relatively strong across the board, Regional airports consistently edge ahead – likely reflecting smoother operations, smaller scale and easier movement through terminals. Notably, Design and Experience also score highest in regional settings, reinforcing earlier findings around the positive sentiment linked to simpler, less congested travel environments.

Thematic Satisfaction (out of 100)

Theme	Overall AU/NZ	Capital Cities	Regional Cities
Cleanliness	82	82	83
Design	81	80	84
Efficiency	79	79	77
Experience	81	81	84
Maintenance	82	81	85
Navigation	80	79	83

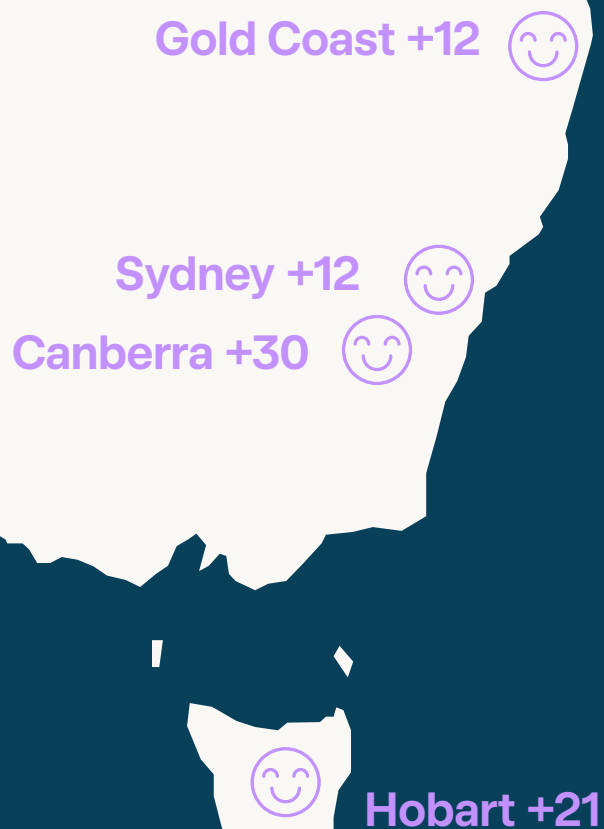■ Overall AU/NZ ■ Capital Cities ■ Regional Cities

06

Individual Airport Performance

With satisfied travellers being so valuable, property financiers and shareholders are always interested to know which airports are performing best.

In the following section, we focus on the best performing airports – presenting their relative performance across the sentiment NPS+ metrics, touchpoints and themes.

Gold Coast +12

Sydney +12

Canberra +30

Auckland +16

Hobart +21

Where are the happiest travellers?

The top 5 airports in our research are a mix of the largest, medium-sized and smaller airports which indicate that it is possible for an airport of any size to achieve a high level of traveller sentiment.
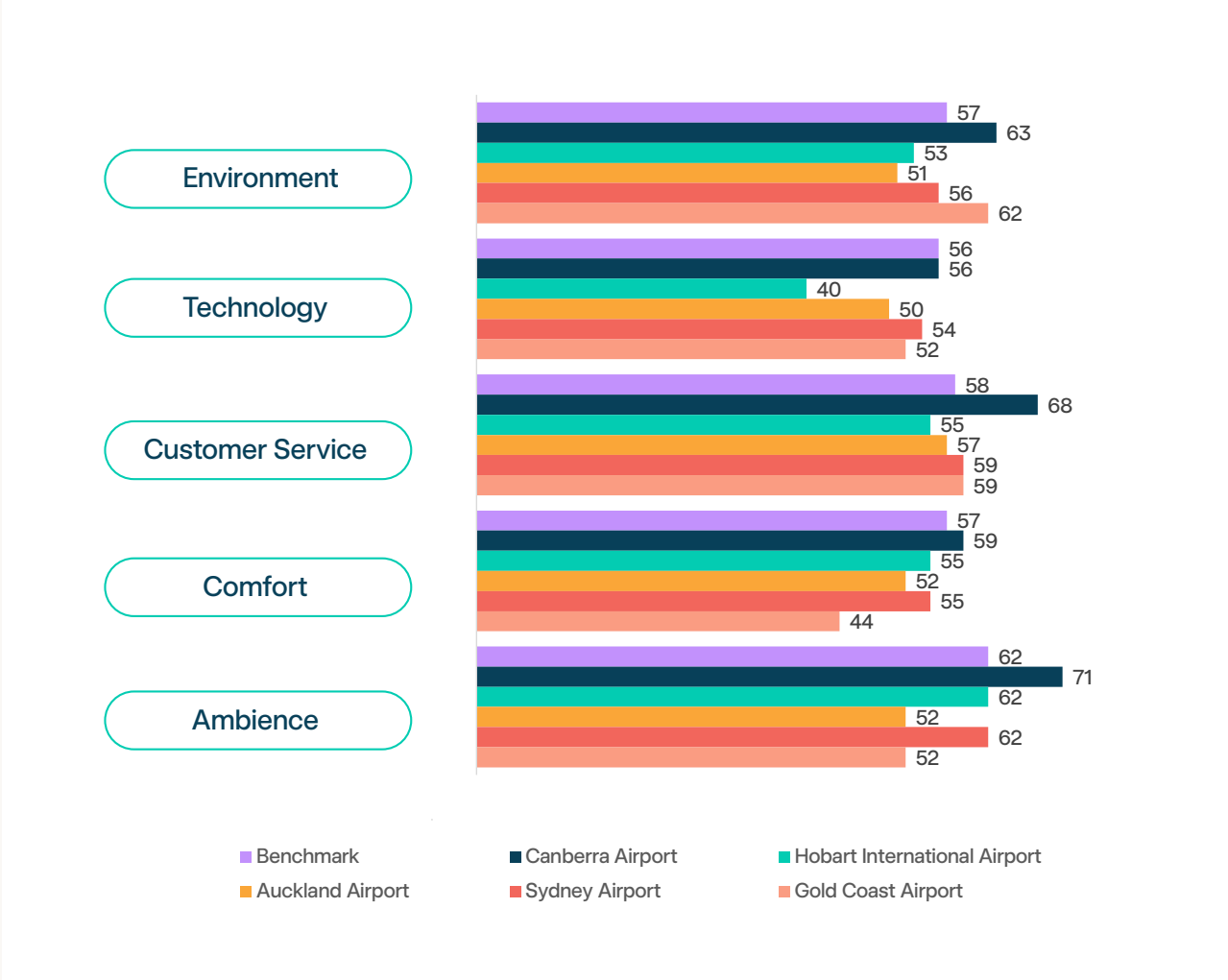
What are passengers satisfied most with?

At the leading airports travellers were asked what they believe to be the most satisfying aspects of the experience.

Travellers are most satisfied with ambience, customer service and environment – with top scores recorded at Canberra, Hobart and Gold Coast airports. Notably, ambience at Canberra leads the field (71), well above the benchmark (62). Technology sees the widest variation, with Auckland trailing behind at 40.

These results highlight the importance of atmosphere and human interaction in shaping positive airport experiences – often outweighing infrastructure alone.

What do travellers think is satisfying them? (out of 100)

Environment
- 57
- 63
- 53
- 51
- 56
- 62

Technology
- 56
- 56
- 40
- 50
- 54
- 52

Customer Service
- 58
- 68
- 55
- 57
- 59
- 59

Comfort
- 57
- 59
- 55
- 52
- 55
- 44

Ambience
- 62
- 71
- 62
- 52
- 62
- 52

Legend:
- ■ Benchmark
- ■ Canberra Airport
- ■ Hobart International Airport
- ■ Auckland Airport
- ■ Sydney Airport
- ■ Gold Coast Airport

07

Want to know more about your airport?

While the insights in this report represent one of the most comprehensive studies on Australian and New Zealand airports, your airport will have its own unique contextual challenges.
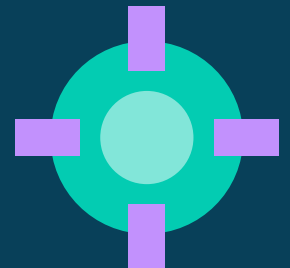
Please contact us if you would like to know how your airport performed against the Australian and New Zealand Benchmark.

www.prescient.properties

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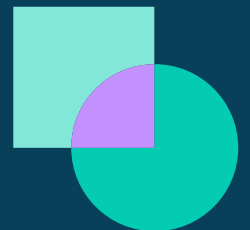david.grant@prescient.properties

A

Where are the traveller opportunities (by airport type)?

Nuanced sentiment differences exist for each airport type creating differentiated traveller opportunities.

The following pages offer topline summaries for each Airport type: Capital Cities, Regional Cities, Small Airports, Medium Airports and Large Airports.

It is a synthesis of the quantitative data and traveller comments. These findings highlight the highest performing factors that are driving sentiment as well as opportunities for improvement.

Capital Cities

Travellers are loyal, but few Capital City airports deliver standout experiences that feel better than the alternatives.

Highest performing factors supporting satisfaction

- Strong performance on wayfinding and directional signage, particularly in newer terminals
- High loyalty intent – travellers report they are likely to return despite moderate fulfilment
- Well-rated security and arrivals processes, offering a sense of control and predictability
- Digital tools, apps and real-time updates support confidence and self-navigation

Opportunities for improvement

- Seating availability and comfort are ongoing pain points, especially at peak periods
- Food variety, pricing and value remain below expectations – "expensive and limited" is a common refrain
- Parking affordability and ease of access score below national benchmarks
- Capital City airports trail on preference metrics – many do not feel better than others of similar scale

Regional Cities

Regional airports outperform their capital city counterparts on sentiment, driven by simplicity, speed and service.

Highest performing factors supporting satisfaction

- High ratings for ease of movement, with short walking distances and fewer queues
- Positive sentiment around staff friendliness and service culture
- Check-in and baggage claim rated highly for speed and clarity
- Higher scores across cleanliness, maintenance and efficiency themes
- Strong traveller preference – many see their local regional airport as better than others.

Opportunities for improvement

- Food and beverage options are often limited in both variety and opening hours
- Retail choice is narrow and may not justify time in terminal
- Travellers note inconsistent amenities (e.g. toilets, Wi-Fi, parent rooms)
- Need to improve mobility support and accessibility signage, particularly for ageing populations

Large Airports

Large airports benefit from scale, but size brings complexity – and many fall short of growing expectations.

Highest performing factors supporting satisfaction

- High awareness of brand presence, choice and facilities
- Technology, entertainment and digital tools often rated above benchmark
- Strong results for arrivals experience, including passport control and rideshare access
- Frequent and premium travellers rate these airports higher across nearly all metrics

Opportunities for improvement

- Wayfinding and transfers across terminals are commonly cited as difficult or unclear
- Touchpoint cleanliness and maintenance suffer under heavy foot traffic
- Travellers express frustration with crowded seating zones and unclear gate information
- Retail pricing, food choice and layout often disappoint relative to expectations
- Many large airports underperform on advocacy and fulfilment, despite strong infrastructure

Medium Airports

Medium-sized airports perform steadily – but often struggle to offer a distinct experience or sense of place.

Highest performing factors supporting satisfaction

· Reliable performance across security, check-in and digital communications
· High satisfaction among younger travellers aged 25–44, especially business travellers
· Stronger-than-average scores on public transport and terminal entry points
· Regular travellers highlight low congestion and manageable walking distances

Opportunities for improvement

· Fulfilment and preference scores suggest experiences are forgettable rather than frustrating
· Feedback highlights issues with navigation during renovations or layout changes
· Seating and waiting areas often lack comfort, power outlets or clear zoning
· Retail and food pricing perceived as poor value for size and offer

Small Airports

Small airports offer clarity and convenience – outperforming on sentiment despite fewer facilities and smaller footprints.

Highest performing factors supporting satisfaction

· Top scores for check-in, signage and terminal flow – especially among infrequent travellers
· Highly rated for simplicity, speed and lack of stress
· Positive sentiment from family and leisure travellers, who value personal service
· Fewer operational disruptions drive high loyalty and repeat intention

Opportunities for improvement

· Consistently low scores for food and beverage availability, especially after security
· Limited seating and lounge options affect dwell-time comfort
· Travellers call for more parking spaces and clearer access signage
· Lack of charging stations, entertainment or quiet zones is noted by regular flyers

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for better places.

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