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RESEARCH PAPER

Europe's Most Passenger-Friendly Airports The European Consumer Airport Index

Consumer Choice Center
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INTRODUCTION

Summer is nearly over and while millions of Europeans are set to return from their well-deserved vacations, they may need additional strength to brace the long lines and stressful travel on their journey home. Many airports struggle with passenger peaks in high-season, and that experience trickles down to the average passenger.

In order to prevent a negative passenger experience and pick the optimal hubs for future trips, we examined Europe's 30 largest airports (by passenger volume) and ranked them in terms of passenger experience, ranked according to a mix of factors ranging from location and transportation options to in-airport experience and flight network access.

This is the First Annual Edition of the European Consumer Airport Index, seeking to rank Europe's most passenger-friendly airports. We reached out to all of Europe's Top 30 airports and asked for relevant data, but also found data in annual reports, online statistics, and conducted our own research to collect all necessary information.

<u>Research Note</u>: We strive to improve the quality of the underlying data of this index year by year and aim to refine its methodology moving forward. We sometimes faced contradictory information and indicators measured differently by different airports (e.g. number of destinations is sometimes shown as average destinations flown to throughout the year, sometimes includes charter destinations, and sometimes show the total destinations connected to in one year). We ask the readers of this index to acknowledge the difficulties

working with heterogeneous data and caution users of this index to be aware of the underlying data complications.

Overall Passenger-Friendliness Index (includes the above-mentioned indicators but also adds direct rail links from airport, availability of ride-hailing services, competition of airlines, on-site hotels, number of destinations, number of airlines, convenience in changing terminals)¹:

OVERALL SCORE: TOP 10 AIRPORTS FOR PASSENGER-FRIENDLINESS IN EUROPE:

Rank	Airport	City	Total Score
1	Brussels Airport	Brussels	166.50
2	Zurich Airport	Zürich	165.50
3	Düsseldorf Airport	Düsseldorf	153
4	Adolfo Suárez Madrid–Barajas Airport	Madrid	151.5
5	Manchester Airport	Manchester	150.5
6	Copenhagen Airport	Copenhagen	150
7	Amsterdam Airport Schiphol	Amsterdam	140.00
8	Stockholm Arlanda Airport	Stockholm	135
9	Frankfurt am Main Airport	Frankfurt	131.50
9	Munich Airport	Munich	131.50

The European Passenger-Friendliness Ranking shows mainly northern European airports in the Top 10. Madrid Barajas is the only southern European airport among the ten best ranked airports and so far no eastern European airport made it in the Top 10. The lack of eastern European airports can also be explained by three Moscow airports being among Europe's Top 30 airports in terms of passenger volume.

The three best ranked airports Brussels, Zurich, and Duesseldorf all have between 25 and 32 million passengers per year and are merely the third of the size of Europe's largest airports

We also refrained from using the Minimum Connecting Time (MCT) as an indicator as larger airports tend to have various MCTs depending on the nature of the passengers' itineraries

¹ Additional Indicators such as wait times at security and immigration and on-time-performance were only available/reported by a few of the analyzed airports and hence are not included in this current index

London Heathrow and Paris Charles De Gaulle. Neither of these made it into the Top 10 of our ranking.

Some implications for passengers:

- Starting a journey at one of the Top 10 airports promises more convenient travel to the airport and a *good to great* passenger experience at the airport.
- If you need to connect in Europe, hubs in northern Europe are more likely to provide a convenient connection than those in the south.
- Size of an airport does not necessarily mean more convenience and better infrastructure. With Amsterdam and Frankfurt Airport just two of Europe's five largest airports made it into the ten most convenient airports of our ranking.

RANKING OF THE LIKELIHOOD NOT TO BUS TO THE PLANE (MEASURED BY 'NUMBER OF ANNUAL PASSENGERS BY JET BRIDGE'):

Rank	Airport	City	PAX/Bridge
1	Brussels Airport	Brussels	466,835
2	Adolfo Suárez Madrid–Barajas Airport	Madrid	478,440
3	Zurich Airport	Zürich	501,830
4	Munich Airport	Munich	513,929
5	Istanbul Airport	Istanbul	524,475

Ranking of the proximity to City Center (in kilometers):

Rank	Airport	City	Distance from City Center
1	<u>Dublin Airport</u>	<u>Dublin</u>	7
2	<u>Lisbon Airport</u>	<u>Lisbon</u>	7
3	<u>Düsseldorf Airport</u>	<u>Düsseldorf</u>	7
4	Copenhagen Airport	<u>Copenhagen</u>	8
5	<u>Palma de Mallorca Airport</u>	<u>Palma de Mallorca</u>	8

Choice of Airport Lounges (measured by 'Number of total annual passengers per lounge'):

Airport	City	Rank	# of Lounges	pax per lounge
<u>Heathrow Airport</u>	<u>London</u>	1	44	1,820,461
Zurich Airport	<u>Zürich</u>	2	15	2,074,232
Vnukovo International Airport	<u>Moscow</u>	3	9	2,386,498
Frankfurt am Main Airport	<u>Frankfurt</u>	4	29	2,396,905
<u>Vienna International Airport</u>	<u>Vienna</u>	5	11	2,457,935

Restaurant and Shopping experience ('Number of annual passengers per Restaurants and Shops'):

Rank	Airport	City	pax per shop/resto
1	Zurich Airport	Zürich	171,897
2	Malpensa Airport	Milan	177,881
3	Munich Airport	Munich	192,723
4	Orly Airport	Paris	207,004
5	Amsterdam Airport Schiphol	Amsterdam	227,006

Methodology:

The maximum possible score is 235 points.

Distance from City Center can get an airport a maximum of 30 points. A shorter ride from/to an airport allows shorter travel and hence allows to maximize your day at your destination.

- <10km = 30 points
- <15km = 22.5 points
- <20km = 15 points
- <25km = 10 points
- <30km = 4 points
- < 35km = 2 points
- >35km = 0 points

Ride Hailing Availability (e.g. Apps like Uber or BOLT can be used to get picked up) gets an airport up to an additional 10 points. We have discounted this in cases where ride-sharing services are more expensive than licensed taxis.

Direct access to metro/light rail gets an airport additional 15 points.

Direct access to National Rail gets an airport up to an additional 15 points (depending on how comprehensive these connections are).

Passengers per Shops and Restaurants (total) can get an airport a maximum of 20 points. More shops and restaurants allow more food and shopping choices.

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<200k = 20 points
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<250k = 15 points

<300k = 10 points

<400k = 4 points

<500k = 2 points

>500k = 0 points

Passengers per Jet Bridge gets an airport a maximum of 40 points. Jet Bridges allow passengers to board a plane directly from the terminal and replace an inconvenient walk over the tarmac or a longer bus ride to a off-gate parking position.²

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<500k = 40 points
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<750k = 20 points

<1,000k = 10 points

>1,000k = 0 points

Choice of Airlines (Market Share of leading Airline) can get up to 15 points. The larger the market share of the leading airline (group) is the more they can dictate ticket fares. Airports with healthy competition among airlines allow consumers more choice and tend to offer lower fares.

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<25% = 15 points
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<40% = 10 points

<55% = 5 points

>55% = 0 points

Pax/Lounge can get an airport a maximum of 15 points. More lounges allow usually shorter paths to the departing gate and indicate also more space for lounge visitors.

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<2.5mn = 15 points
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<5.0mn = 10 points

<7.5mn = 5 points

>7.5mn = 0 points

Easy connection between gates and terminals can get an airport up to 15 points. It can be very stressful to connect between terminals or even just gates within one terminal.

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² We are aware that some airports use multiple jet bridges for merely one plane at a time.

This indicator scores convenience during layovers and low barriers (e.g. not having to walk out of the terminal building, cross the street, and go through security again).

An **On-site Airport Hotel** can get an airport up to 10 points. This depends on whether the hotel is directly at the airport or requires a longer walk or very short shuttle ride.

Number of Airlines can get an airport up to 15 points. More airlines catering to the same airport usually leaves passengers with more choice, better departure times, and more destinations.

- >80 = 15 points
- >65 = 10 points
- >50 = 5 points
- <50 = 0 points

Number of Destinations can get an airport up to 15 points³. More destinations usually means more direct flights and thus less needed connections at another airport.

- >225 = 15 points
- >175 = 10 points
- >125 = 5 points
- <125 = 0 points

Bonus Points for airports that:4

- Have a CBP Preclearance Facility allowing passengers to clear US customs before even boarding their trans-Atlantic flight = 10 points
- Communicate their security wait times and have clear goals to keep these low/reduce these = 5 points
- Have reported an on time performance (delay of less than 15 minutes) of >80% of their flights = 5 points
- Have a clear Service Level Agreement on maximum immigration wait times

⁴ We call these bonus points as most airports were not able to report these numbers.

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³ Airports report the number of operating airlines and destinations differently. We aimed to equalize numbers and account for seasonal changes, average numbers, charter destinations, etc. but are still aware that we don't have perfect data for this indicator. Therefore, we give it a low weight in the overall scoring.

About the Authors



Fred Roeder (@FredCyrusRoeder) is a German Health Economist and Managing Director of the Consumer Choice Center. He has been consulting governments, non profits, and the private sector on economic reforms in two dozen countries with a strong focus on emerging markets and post-communist countries. Besides healthcare his research areas are transportation, telecommunication, and digital technologies. He is a board member of several technology companies in Europe and North America and on advisory boards of several nonprofits and for profit corporations.



Yaël Ossowski (@YaelOss) is an international consumer advocate and writer. He's currently deputy director for the Consumer Choice Center. Since 2010, he has worked as a journalist and grassroots organizer with activists around the world. He was previously Watchdog.org's Florida Bureau Chief, chief Spanish translator, and national investigative reporter from 2012-2015. He is also a contributor to Metropole Magazine in Vienna and editor of Devolution Review.

Yaël has worked as a multimedia journalist globally, writing for outlets such as the Chicago Tribune, Austin American-Statesman, Washington Examiner, The Charlotte Observer, Arizona Capitol Times, The Philadelphia Inquirer, Detroit News, Miami Herald, Reason Magazine, American Spectator, The Gaston Gazette, FoxNews.com, and more. He is a member of the Society of Professional Journalists, studied at Concordia University in Montréal, the University of Vienna, and received a Master's Degree in Philosophy, Politics, Economics (PPE) at the CEVRO Institute in Prague.

The Consumer Choice Center is the consumer advocacy group supporting lifestyle freedom, innovation, privacy, science, and consumer choice. The main policy areas we focus on are digital, mobility, lifestyle & consumer goods, and health & science.

The CCC represents consumers in over 100 countries across the globe. We monitor closely regulatory trends in Washington, Brussels, Geneva and other hotspots of regulation and inform and activate consumers to fight for #ConsumerChoice.



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