

EUROPE'S MOST PASSENGER-FRIENDLY AIRPORTS 2023

ZURICH REMAINS AT THE TOP!

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INTRODUCTION

This year is a story of recovery and challenges for European travelers and airports alike. In positive news, many of the best airports on our index remain the best: Zurich, Brussels, and Frankfurt are the top three this year. Another positive update is that consumer confidence in the airline sector rebounded after the Covid-19 pandemic. Just last April, the European division of Airports Council International registered a [21.1% rise](#) in passenger traffic compared to 2022. Yet, more people in airports can leave everyone with worse overall service. Some locales in our index were particularly affected – Dusseldorf went down from second place in 2020 to 16th this year.

Flyers also have to contend with the reality of today's geopolitics before they even set foot on a plane. In the wake of Russia's invasion of Ukraine, the [United States, all 27 countries in the European Union, the United Kingdom, and Canada](#) blocked Russian flights from using their domestic airspace. The Kremlin retaliated by closing its skies to [36 countries](#). Flights to and from Europe must take long detours around Russia, with planes re-routed to adjacent venues and extra hours added for each journey.

Given these realities, we ranked Europe's thirty largest airports (measured by passenger volume) to prevent negative consumer experiences and help travelers pick the best hubs for their next trip. We used several factors ranging from location and transportation options to the availability of services (restaurants, lounges, shops),

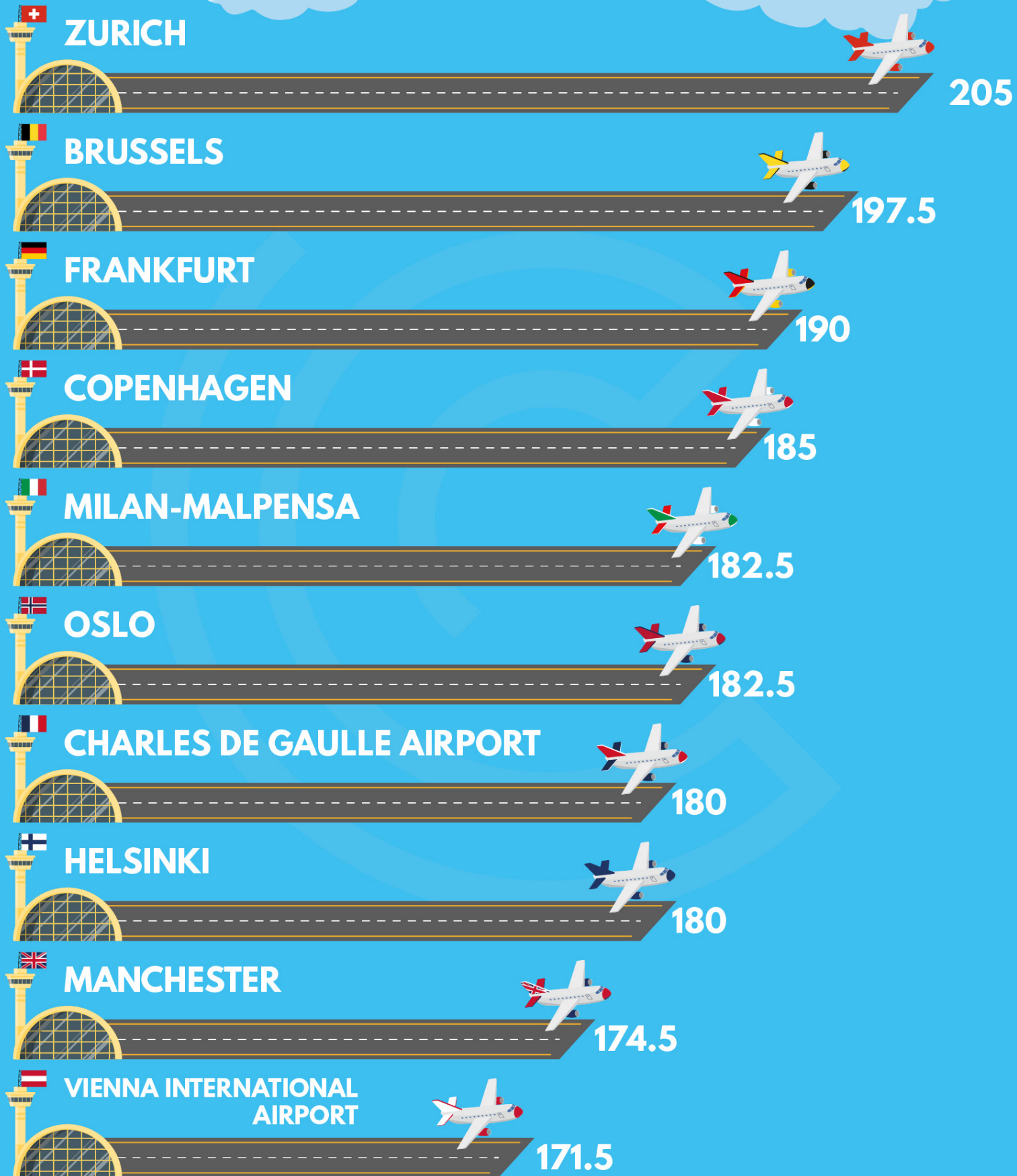
security waiting times, and the average proportion of flight delays. With this information, consumers can quickly and reliably identify the airport of their choice.

Our third annual edition of the European Consumer Airport Index refines and updates our analysis using data provided to us by airports, annual reports, online statistics, and our own research. Passenger volumes reflect the years 2021 and 2022. To represent ongoing concerns, we eliminated the “Covid testing” category from the analysis and expanded on average wait times using [the latest available information](#).

Because of the [unreliability of Russian official statistics](#), our new list does not include any of the three major Moscow venues (Domodedovo, Vnkovo, and Sheremetyevo). We also needed a replacement for the now-defunct Berlin Tegel airport. In their stead, we welcomed four new hubs to the tally: Antalya, Berlin-Brandenburg, Malaga, and Warsaw Chopin.

Warsaw Chopin marks the first time we featured a Polish airport in the index. With a reported [14.4 million passengers](#) in 2022, it reflects Poland’s increasing prominence as an Eastern European leader and Russia’s isolation on the world stage.

OVERALL SCORE: TOP 10 AIRPORTS FOR PASSENGER CONVENIENCE IN EUROPE



Similar to previous entries, eight of the ten contenders (Zurich, Brussels, Copenhagen, Milan Malpensa, Oslo, Helsinki, Manchester, and Vienna) are primarily smaller airports of between 6.1 and 22.6 million passengers in 2022, roughly a third the size of aeronautic juggernauts like Istanbul (64.5 million people annually). Frankfurt (48.8 million travelers) and Charles de Gaulle (57.47 million) are notable exceptions to this rule thanks to their dense connections and vast number of services.

Another general trend in the data is declining scores compared to previous indices despite more bonus points awarded than ever before. This is partly due to the sharp increase in passenger numbers, with the count for most venues doubling between 2021 and 2022. The influx of customers decreased the score awarded for passengers per total lounges and flyers per total shops and restaurants. Another reason is the increase in average delays. By measuring the proportion of flights that experienced postponements of more than 30 minutes, we found that anywhere between a quarter and 58% of all flights were no longer on schedule.

IMPLICATIONS AND BENEFITS FOR CONSUMERS

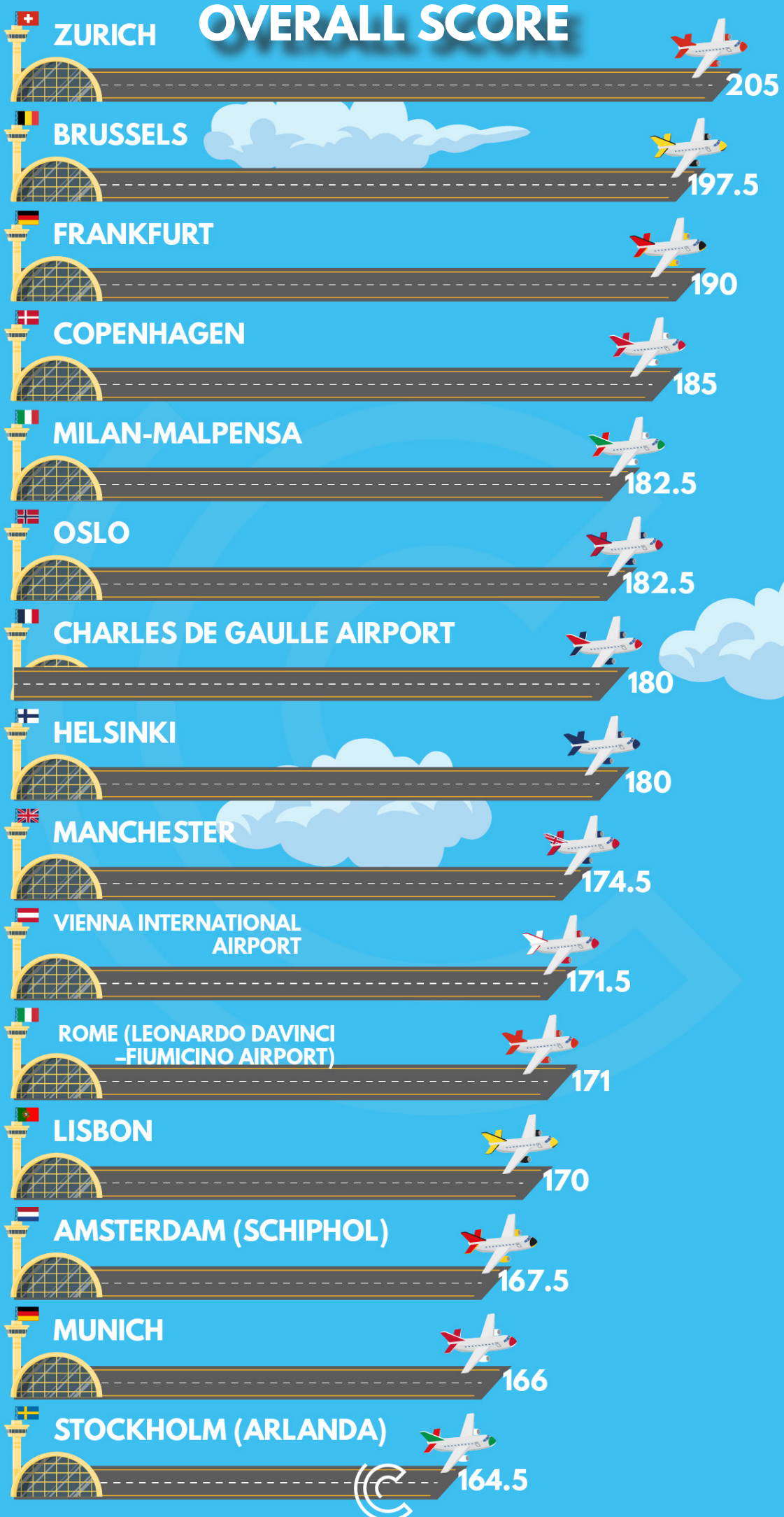
There are several benefits to choosing one of the top five arrival or departure points, such as more flight options, destinations, and airlines, less hassle getting to and from the airport, more restaurants, lounges, and shops, less congestion on aircraft bridges

and more accessible connections to terminals, and less downtime due to delays and security checks.

- Top 5 (and top ten) selections offer the best experience all around
- Northern venues continue to provide convenient European connections compared to Southern and Eastern hubs (though the number of central European hubs has increased this year).
- Bigger is not necessarily better, especially when it results in worse infrastructure, fewer flight links, crowded airports, and long security lines.
- Consumers' recent frustrations with airport services are neither anecdotal nor accidental but part of a generalizable issue of post-Covid recovery, as airports struggle to match the surge in passenger volumes.

RESEARCH NOTE

We strive to improve the quality of this index's underlying data every year and aim to refine its methodology further. We sometimes faced contradictory information and indicators measured differently by different airports. For instance, the number of destinations can refer to either average destinations throughout the year, charter destinations, or the total connected annually. We preferred to leave that entry empty where we found little or unreliable information (as was the case for some airports and average security time). We ask the index readers to acknowledge the difficulties in working with heterogeneous data and caution users to be aware of the underlying complications.



OVERALL SCORE

ZURICH

205

BRUSSELS

197.5

FRANKFURT

190

COPENHAGEN

185

MILAN-MALPENSA

182.5

OSLO

182.5

CHARLES DE GAULLE AIRPORT

180

HELSINKI

180

MANCHESTER

174.5

VIENNA INTERNATIONAL AIRPORT

171.5

ROME (LEONARDO DAVINCI -FIUMICINO AIRPORT)

171

LISBON

170

AMSTERDAM (SCHIPHOL)

167.5

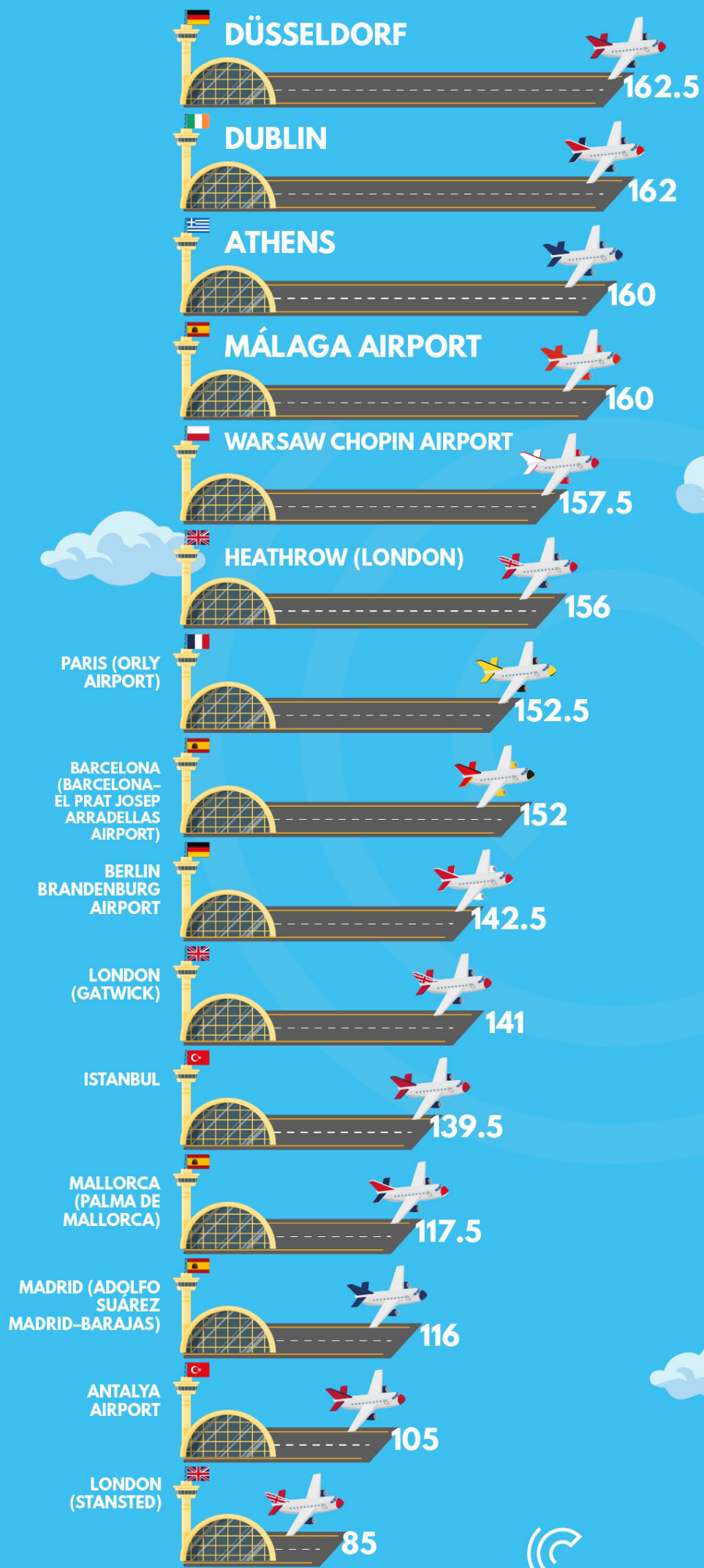
MUNICH

166

STOCKHOLM (ARLANDA)

164.5





METHODOLOGY

The maximum score (bonus points included) is 247.

1. DISTANCE TO THE CITY CENTER

The category gets an airport a maximum of 30 points. A shorter ride to / from an airport saves a substantial commute time. It means you can make the most of your day abroad.

≤ 10km = 30 points

≤ 15km = 22,5 points

≤ 20km = 15 points

≤ 25km = 10 points

≤ 30km = 4 points

≤ 35km = 2 points

> 35km = 0 points

2. RIDE-HAILING AVAILABILITY

If apps like Uber, Bolt, Lyft, and others can be used to pick you up from the airport, then the venue receives an extra 15 points. We have discounted this in cases where ride-sharing services are more expensive than licensed taxis (Mallorca), major apps are unavailable, and where we know de-facto carpooling is controlled by taxi companies (Istanbul).

3. DIRECT ACCESS TO METRO/LIGHT RAIL

Nets an airport 15 points if present.

4. DIRECT ACCESS TO NATIONAL RAIL SERVICES

Awards an airport 15 points. Edge cases received more marks depending on how comprehensive the connections were. If they were present but modest (Helsinki, Munich, Antalya), the hub only received 5 points. If ties had improved, though they still needed to

catch up regarding access (like at Gatwick), the airport received 10 points.

5. PASSENGERS BY TOTAL LOUNGES

Can get an airport a maximum of 15 points. More lounges mean less time going to departure gates and more space for lounge visitors.

$\leq 2.5\text{mn} = 15$ points

$\leq 5.0\text{mn} = 10$ points

$\leq 7.5\text{mn} = 5$ points

$> 7.5\text{mn} = 0$ points

6. PASSENGERS PER JET BRIDGE

Gets an airport a maximum of 40 points. Aircraft Bridges allow passengers to board a plane directly from the terminal, sparing them a walk over the tarmac or a longer shuttle ride to an off-gate parking position.

$\leq 500\text{k} = 40$ points

$\leq 750\text{k} = 20$ points

$\leq 1.000\text{k} = 10$ points

$> 1.000\text{k} = 0$ points

7. PASSENGERS BY TOTAL SHOPS AND RESTAURANTS

Can get an airport a maximum of 20 points. More shops and restaurants mean more choices for consumers.

$\leq 200\text{k} = 20$ points

$\leq 250\text{k} = 15$ points

$\leq 300\text{k} = 10$ points

$\leq 400\text{k} = 4$ points

$\leq 500\text{k} = 2$ points

$> 500\text{k} = 0$ points

8. CHOICE OF AIRLINES/MARKET SHARE – COMPETITION SCORE

This category can get up to 15 points. The larger the market share of the leading airline (group) measured in the percentage of seats offered by the most prominent airline compared to total capacity (a proxy for competition density), the more they can dictate ticket fares. Airports with healthy competition among airlines allow consumers more choices and tend to offer lower fares.

<25% = 15 points

<40% = 10 points

<55% = 5 points

>55% = 0 points

9. THE NUMBER OF AIRLINES

Can get an airport up to 20 points. More airlines catering to the same airport leave passengers with more choices, better departure times, and more destinations.

≥ 30 = 20 points

≥ 25 = 15 points

≥ 20 = 10 points

≥ 15 = 5 points

<15 = 0 points

10. THE NUMBER OF DESTINATIONS

Can get an airport up to 20 points. More destinations usually mean more direct flights and thus fewer needed connections at another airport.

≥ 90 = 20 points

≥ 75 = 15 points

≥ 55 = 10 points

$\geq 25 = 5$ points

$< 25 = 0$ points

11. ON-SITE AIRPORT HOTEL

Can get an airport up to 10 points. Scoring depends on the degree of accessibility. The hub receives total points if the hotel is directly at the airport. If it requires a long walk, it only receives 5 points. If the inconvenience is minor (like a very short shuttle ride), it receives 7.5 points.

12. EASY CONNECTION BETWEEN GATES AND TERMINALS

Can get an airport up to 15 points. Connecting between terminals or even just gates within one terminal can be very stressful. 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).

13. BONUS POINTS FOR AIRPORTS THAT:

- Have a CBP Preclearance Facility allowing passengers to clear US customs before even boarding their trans-Atlantic flight (Dublin) = 10 points

- For security waiting times ≤ 3 minutes, the score was 2 points.

- For delays, we considered the proportion of flights that experienced postponements averaging more than 30 minutes. The points were distributed in the following manner:

$\leq 25\% = 5$ points

$\geq 40\% = 2.5$ points

$> 40\% = 0$ points

- Have an explicit Service Level Agreement on maximum immigration wait times.



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