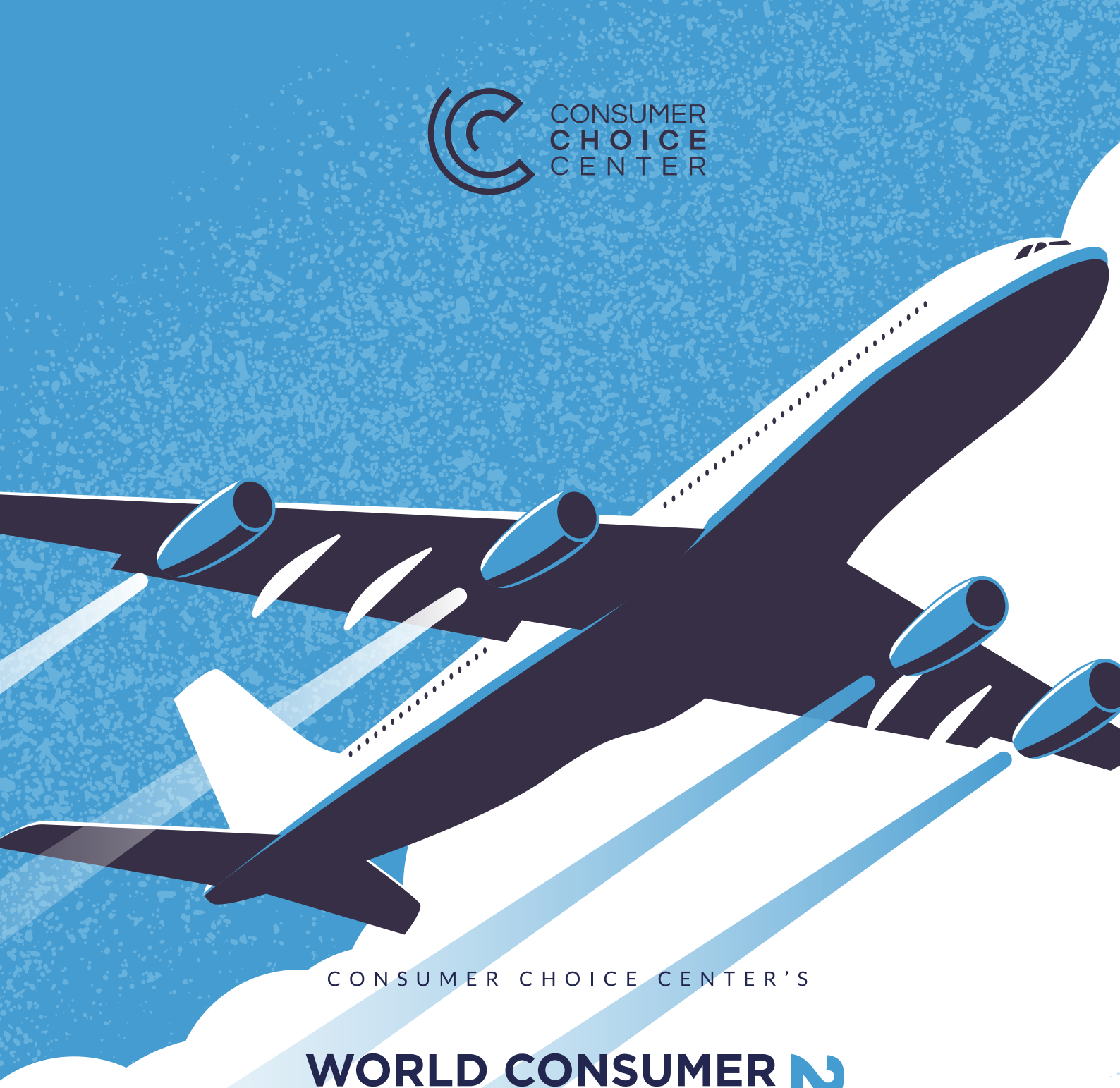
CONSUMER CHOICE CENTER



CONSUMER CHOICE CENTER'S

WORLD CONSUMER AIRPORT INDEX 2025

TOKYO HANEDA AND DUSSELDORF TOP THE CHARTS!

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The period 2024-2025 will be remembered as a milestone moment in commercial aviation. Several airports broke records in passenger volumes. Vienna International Airport's numbers swelled to 31.7 million, the highest figure since records began in 1955. London Heathrow reached 83.85 million, beating the pre-pandemic highs. The same was true for Dallas-Fort Worth (87.8 million), Josep Tarradellas Barcelona-El Prat Airport (55.03 million), Lisbon's Humberto Delgado Airport (35.09 million), Dublin (34.6 million), and Warsaw Chopin (21.2 million).

This enormous wave of passengers is challenging an aviation system that is already creaking at the seams with supply chain issues and political demands. The International Air Transport Association (IATA) documents the aging of the global fleet. The average age of an airplane has gone up from 13.6 years between 1990 and 2024 to 14.6 years in 2024-2025, adding to airline companies' and airports' maintenance and operation costs. Those exact costs are increased by the need to comply with the European Union's 2023 Corporate Sustainability Reporting Directive, which fully comes into force in 2025 and introduces even more harmonized requirements for reporting emissions across the aviation industry. Of course, the two problems tend to complicate each other: an older fleet will register as less fuel efficient, while more red tape will make it more expensive to invest in replacements.

Many airports have soared in performance despite these challenges. In terms of large-scale airports, the list was topped by Tokyo Haneda in first place with 170 points, followed by Thailand's Suvarnabhumi in second place (158.5 points). Singapore's Changi completes the podium in third place, held back only by the inconvenience of its relative distance to the city center and lacking an equivalent to a national rail connection. Dusseldorf (210 points) is number one in the smaller airports rankings, followed closely by Copenhagen (195 points). The previous European champion, Zurich Airport, is in third place, losing points due to a low airline competition score and the drawback of a stringent night-time flight curfew.

On the opposite side of the spectrum are regional hubs struggling to adapt to the changing environment. London Gatwick (99 points) is the lowest-ranked entry among huge venues, while London Stansted (75 points) is in the same position for those more modest in size. Guangzhou Baiyun (104 points) and Istanbul (117 points) are the second and third-lowest among mega-airports, respectively, mirroring Mallorca (109 points) and Ezeiza (119 points) in the other tally. Low scores are due to extreme distances from city centers, no ride-hailing options separate from taxi companies, poor access to other options like national rail or light rail, poor competition across airlines (with one company regularly dominating activity), overcrowded shops and restaurants, long security wait times, and a high percentage of average delays.

Between the two extremes are well-known places like Charles de Gaulle and London Heathrow (joint 8th at 149 points), Dubai International (10th place with 147.5 points), Atlanta-Hartsfield-Jackson, Amsterdam Schiphol, and Seoul Incheon (landing in the 17th spot with 137.5 points), and Vienna International (in the 10th spot on the parallel ranking at 147.5 points).

To capture all these details and challenges, we have gone global with the very first edition of the World Consumer Airport Index. This version builds on our European Airport Index 2024, adding 20 entries worldwide to the mix. It refines and updates our analysis using airport data, annual reports, online statistics, and our own research.

In the process, the index eliminates variables like passengers per lounge, jet bridge, and CBP clearance due to the unreliability and lack of validity in the underlying data. Not all airports fully report the number of lounges and jet bridges. Moreover, comparisons are often distorted by differences in size. Three smaller lounges might not be as relevant as one spacious lounge, yet the former would score higher. The analysis adjusts weights and scores to reflect the change, adding extra nuance to complicated cases falling between full scores and no points. We introduced two new categories of night-time curfews and "other considerations" to capture airport conditions better, expanded average delays into a standalone category, and introduced more entries in terms of security wait times.

Notably, as the above analysis implies, the index features not one but two separate classifications: one containing the top 30 busiest airports (defined as those with over 35 million passengers) and another comprising the 20 best for smaller venues (equal to or less than 35 million). Having two independent rankings acknowledges the differences in infrastructure capacity, staff, and amenities available to airports of varying sizes.

TOP 30 LARGEST AIRPORTS WORLDWIDE

Ranking	Airport	Airport Code	Points
1	Tokyo Haneda	HND	170
2	Bangkok Suvarnabhumi	BKK	158.5
3	Singapore Changi	SIN	157.5
4	Benito Juárez Mexico City	MEX	155
4	Barcelona El Prat	BCN	155
6	Los Angeles International	LAX	152
7	Chhatrapati Shivaji Maharaj Mumbai	BOM	150
8	Charles De Gaulle	CDG	149
8	London Heathrow	LHR	149
10	Dubai International Airport	DBX	147.5
10	Frankfurt Airport	FRA	147.5
12	King Abdulaziz (Jeddah)	JED	145
13	Roma Fiumicino	FCO	144
14	Madrid–Barajas	MAD	142.5
14	Antalya Airport	AYT	142.5
16	Shanghai Pudong	PVG	142
17	Atlanta Hartsfield-Jackson	ATL	137.5
17	Amsterdam (Schiphol)	AMS	137.5
17	Seoul Incheon	ICN	137.5
20	São Paulo-Guarulhos	GRU	136.5
20	Toronto Pearson International	YYZ	136.5
22	Denver International	DEN	136
23	Munich	MUC	134

24	Seattle-Tacoma	SEA	132.5
25	Soekarno-Hatta	CGK	129
26	Dallas/Ft.Worth	DFW	126
27	Chicago O'Hare	ORD	120.5
28	Istanbul	IST	117
29	Guangzhou Baiyun	CAN	104
30	London Gatwick	LGW	99

TOP 20 SMALLER INTERNATIONAL AIRPORTS WORLDWIDE

Ranking	Airport	Airport Code	Points
1	Düsseldorf	DUS	210
2	Copenhagen	CPH	195
3	Zurich	ZRH	187.5
4	Brussels	BRU	180
5	Malaga Airport	AGP	172.5
5	Warsaw Chopin	WAW	172.5
7	Helsinki	HEL	157.5
8	Humberto Delgado Airport Lisbon	LIS	150
9	Berlin Brandenburg	BER	149
10	Vienna International Airport	VIE	147.5
11	Paris (Orly)	ORY	142.5
12	Stockholm (Arlanda)	ARN	140
12	Oslo	OSL	140
14	Dublin	DUB	137.5
14	Athens International	ATH	137.5
16	Milan Malpensa	MXP	135
17	Manchester	MAN	130
18	Ezeiza	EZE	119
19	Mallorca	PMI	109
20	London (Stansted)	STN	75

The results confirm media and industry reports on record passenger numbers. The average compound annual growth rate is very high at 128.23%, ranging from the lowest value of 69.22% for Ezeiza Airport to the highest figure of 187.12% for Seoul Incheon. Similar to the 2024 European assessment, the bigger venues have seen more significant jumps in traffic. London Heathrow saw a 183.85% increase from approximately 19.39 million in 2021 to a record-breaking 83.85 million in 2024. Similarly, Charles de Gaulle experienced 150.7% growth from 26.19 million in 2021 to 70.29 million last year. By comparison, Warsaw Chopin saw a bump in traffic of "just" 92.60% - a significantly smaller rise, though no less dramatic in absolute terms.

The descriptive statistics also show that the effect of the influx is not necessarily negative. The same European entries from last year

suffered from a higher overall average number of delays (37.40%) than they did in May 2025 (19.3%). Zurich's security wait times have gone up to 5 minutes from the previous index's 1-minute average, though far from the 12 minutes of 2023.

Rather, individual circumstances make all the difference. Manchester Airport's cancellation of 66 departures and 50 arrivals after a power cut in 2024 continues to affect many of the passengers involved due to poor luggage handling. Though it came in at number nine among the smaller airports, Berlin-Brandenburg's performance is still held back by the history of its poor infrastructure planning, when "half a million faults were found back when it was supposed to be opened in 2012, including with a fire safety system that didn't work and more than 170,000-kilometers of cable that had to be reinstalled". Frankfurt Airport's entire system was disrupted in August 2024 by its rodent infestation once a dormouse chewed through power cables and short-circuited an electricity substation.

These examples underline the reality that seemingly random outcomes are often a matter of policy and airport choice. Poor infrastructure options left US airports such as Atlanta Hartsfield-Jackson, Dallas/Fort Worth, Chicago's O'Hare, Los Angeles International, and Seattle Tacoma with fewer points than most of their counterparts in the index. Toronto Pearson Night Flight Restriction Program caps the number of flights between 12:30 am and 6:29 am to a fixed "flight budget" number. Though seemingly offering some flexibility by increasing with the percentage of passengers each year, the program pre-books 80% of the budgeted hour slots, leaving only 20% of flights to be re-accommodated according to circumstances. Unsurprisingly, Toronto Pearson still struggled in February 2025 with a backlog of flight delays following two winter storms and an airplane crash. Accidents and weather are not within an airport's control; but what is in their control is adopting a rigid night-flight system that makes it harder to adapt to changing circumstances, instead of implementing more general noise abatement measures.

IMPLICATIONS AND BENEFITS FOR CONSUMERS

There are several benefits to choosing one of the top five arrival or departure points in both rankings, 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, more accessible connections to terminals, and less downtime due to delays and security checks.

- The top 5 selections in each list offer the best experience all around.
- Though we have generally seen improvements in scores, no single hub earned maximum points, meaning there is always room for improvement.
- Bigger is not necessarily better, especially when it results in worse infrastructure, fewer flight connections, crowded airports, and long security lines. The highest score for the largest airports is 170, while the equivalent figure for smaller venues is 210. The same goes for the top five, which had higher scores for smaller hubs over large airports.
- European entries dominate the ranking of smaller airports, while the picture of larger airports is far more diverse.

RESEARCH NOTE

We strive to improve the quality of this index's underlying data every year and aim to refine its methodology further. We often 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 an entry empty where we found little or unreliable information (as was the case for some airports and average security times). We ask the index readers to acknowledge the difficulties in working with heterogeneous data and caution users to be aware of the underlying complications.

Furthermore, what makes an airport "good" for each individual can have a distinct qualitative element. Please remember, then, that our assessments are strictly quantitative and non-normative. We are not passing moral judgment on airports' goodness and badness or downplaying personal experiences by ranking one airport lower than another. We are simply highlighting measurable conclusions based on the data available at the time of this index.

METHODOLOGY

The present index version uses a simple weighting method, allowing for hierarchical results across dimensions. For instance, the passenger score by total shops and restaurants will always be a maximum of 30 points. At the same time, other categories, such as access to national rail, receive a net lower score of a maximum of 15 points.
The highest score an airport can receive (bonus points included) is 235.

1. Distance to the city center (by car)
This category gives an airport a maximum of 30 points. A shorter ride to or from an airport by car saves substantial commute time, allowing you to make the most of your arrival and departure days. It reflects the relative distance to the city center, judging by major routes (main roads or highways). The score for each entry reflects the average between the available avenues. For instance, the average distance across all three options for Dusseldorf results in 9.3km, earning the venue 30 points.
≤ 10km = 30 points
≤ 15km = 22,5 points
≤ 20km = 15 points
≤ 25km = 10 points
≤ 30km = 4 points
≤ 35km = 2 points
> 35km = 0 points

2. Distance to the city center (straight line)
This variable measures the absolute distance in a straight line from the airport to the city center. Distance affects more than just commute time; it influences the type and number of services, the on-site infrastructure, and the attractions available. It nets an airport a maximum of 30 points.
≤ 10km = 30 points
≤ 15km = 22,5 points
≤ 20km = 15 points
≤ 25km = 10 points
≤ 30km = 4 points
≤ 35km = 2 points
> 35km = 0 points

3. Passenger volumes (millions)
In this category, we refer to the available numbers on passenger volumes for the past four years (2021,2022, 2023, and 2024) to determine the largest and smallest airports worldwide. The tallies also suggest the pace of the airline and airport sectors' post-pandemic recovery.
This section is purely descriptive and does

not award any points.

4. Compound annual growth rate percentage
The figures represent the passenger volumes' mean annual growth rate over the last four years. Similar to the previous category, this section is purely descriptive and does not award any points.

5. 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, major apps are unavailable, and where we know de facto carpooling is controlled by taxi companies (Istanbul, Athens, Copenhagen).

6. Direct access to metro/light rail
This category nets an airport 15 points if present, zero points if not. More complicated cases include those where signage may be confusing (Frankfurt), the venue may be restricted to a particular terminal (Atlanta Hartsfield-Jackson), or generally harder to access due to distance (Dubai International, Soekkarno-Hatta, King Abdulaziz-Jeddah). These cases receive 10 points.

7. Direct access to national rail services
This category 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), or signage remained confusing (Frankfurt), the airport received 10 points.

8. On-site airport hotel
In this category, an airport can earn 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.

9. Easy connection between gates and terminals
This category can get an airport up to 15 points. Connecting between terminals or 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).

10. 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. Figures from the previous year's index were included in a separate column for comparison (they do not count towards the points for this category).
≤25% = 15 points
≤40% =10 points
≤55% = 5 points
>55% = 0 points

11. Number of airlines
This category 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.
≥85 = 20 points
<85 and ≥ 60 = 15 points
<60 and ≥ 40 = 10 points
<40 and ≥ 20 = 0 points

12. Number of destinations
This category nets an airport up to 20 points. More destinations usually mean more direct flights; thus, fewer connections are needed at other airports.
≥ 90 = 20 points
≥ 75 = 15 points
≥ 55 = 10 points
≥ 25 = 5 points
< 25 = 0 points

13. Passengers by total shops and restaurants
This category can get an airport a maximum of 30 points. More shops and restaurants mean more choices for consumers.
<=250 000 = 30 points
>250 000 and ≤350 000 = 25 points
>350 000 and ≤450 000 = 20 points
>450 000 and ≤500 000 = 10 points
>500 000 and <750 000 = 5 points
>750 000 = 0 points

14. Average delays
This category can earn an airport a maximum of 10 points. A high percentage of late flights results in overcrowding, impacting airport services in turn. Shops and restaurants can struggle to cater to the sudden influx of passengers, security waiting may swell, and access to other means of transportation becomes more difficult.
Numbers represent averages derived from websites like Flightera on the same day (30 May 2025). For delays, we considered the proportion of flights that experienced postponements averaging more than 29 minutes.
≤ 15% = 10 points
>15% and ≤ 20% = 5 points
> 20% and ≤ 25% = 2.5 points
> 25% = 0 points

15. Bonus points were awarded for the following:
- For security waiting times ≤ 3 minutes, the score was 5 points.
- Do not feature night-time restrictions in the form of strict night-time curfews or a quota of flights for specific hourly intervals (consumer curfews and general noise abatement measures did not count against the venue). Such airports received 5 extra points.

16. Other considerations
This category refers to general conditions that can impact consumers' experience at the airport that other measures have not captured, like severe backlogs, unaddressed consumer complaints, infrastructure issues, and other issues that can affect airport performance that are highly prominent in consumer testimonials (including rodent infestation!).
Each incident of this nature is a drawback that costs an airport 5 points; hence, two issues lose 10 points, three subtract 15 points, and so on.

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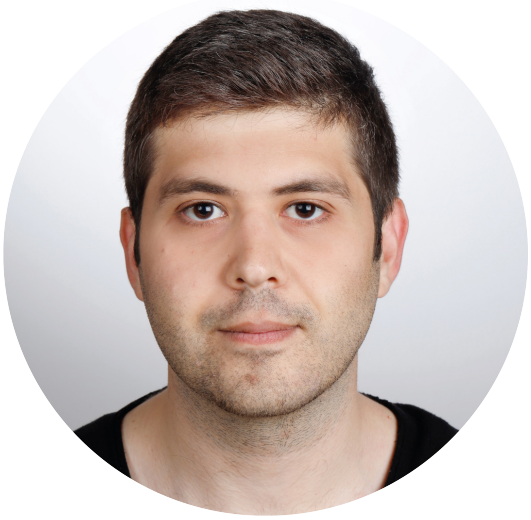
Emil Panzaru is the Research Director at the Consumer Choice Center. He defended his PhD in Political Economy (Research) at King's College London in 2022. Before working at the Center, Emil was a Teaching Assistant at King's College London, teaching students contemporary issues at the intersection of philosophy, politics, and economics. He was also a Frederic Bastiat/Research Fellow at George Mason University's Mercatus Center. He has published and helped publish academic research on incentives, knowledge problems, and public policy.



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The Consumer Choice Center is a non-profit organization dedicated to defending the rights of consumers around the world. Our mission is to promote freedom of choice, healthy competition, and evidence-based policies that benefit consumers. We work to ensure that consumers have access to a variety of quality products and services and can make informed decisions about their lifestyle and consumption.

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Find out more at www.consumerchoicecenter.org

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