



Airport Revenue at Risk: \$695 Million Lost Through Emotional Experience Gaps

7 Executive-Ready Insights to Rebuild Passenger
Trust and Protect Airport Revenue



 AIRPORTS EDITION

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Foreward

In today's rapidly evolving aviation landscape, airports face unprecedented challenges to deliver exceptional passenger experiences while maximizing operational and commercial performance. This research report provides critical insights into how airports can transform passenger experiences to drive greater value.

Our findings reveal that while airports are investing heavily in infrastructure development, many struggle to differentiate on trust and experience. The research identifies key friction points—particularly in check-in, security processes, navigation, and cleanliness—that directly impact passenger satisfaction and commercial performance. We know that from recent research* for every 10 minutes a passenger spends in security, they spend 30% less on retail items.

A key finding is the concept of an emotional experience gap between what the passenger expects and what the airport delivers. This represents a staggering \$695 million in at-risk revenue across just five major airports.

As passenger expectations evolve and competition intensifies, airports must reimagine their approach to customer experience. This isn't merely about aesthetics—it's about creating seamless journeys that align with passenger needs, drive commercial outcomes, and ultimately differentiate in a crowded marketplace. The most successful airports are those that view experience as a strategic platform, connecting the ecosystem of airlines, retailers, and service providers to deliver personalized, friction-free experiences.

This report offers strategic frameworks to successfully navigating these challenges. I hope these insights will provide valuable direction as you consider your own passenger experience transformation journey.



David Pinder
Design Director
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Engine

Executive Summary

America's five busiest airports (ATL, DEN, DFW, LAX, ORD) collectively serve 413 million travelers annually. This report seeks to present key insights on passenger emotions as a way to help CX leaders re-imagine the airport experience.

The insights are based on the analysis of 20,000 passenger reviews. These identify where and why travelers experience frustration and diminished confidence. The data reveals these trust deficits directly impact satisfaction, loyalty, and airport preference. The research confirms that Joy and Anger emotions strongly correlate with the actual review scores, reflecting the highs and lows of airport experiences.

Strategic interventions at critical emotional touchpoints would produce significant improvements.

By addressing these "emotional experience gaps" through enhanced operations and service delivery, airports can substantially improve their competitive position and satisfaction ratings. The study identifies 7 key underperforming drivers across the five airports, with failure to address these issues putting \$695M 'Revenue at Risk' (RaR).

Passengers with high trust show increased spending, greater resilience during disruptions, and stronger brand loyalty. Conversely, trust breaches create enduring negative impressions. This report calls upon airports to urgently re-imagine the passenger journey or risk permanent damage to brand reputation and significant revenue loss in an increasingly competitive aviation market.



Methodology

This report is based on an in-depth analysis of 20,000 passenger reviews from the five busiest US airports, as ranked by ACI World Airport Traffic Dataset 2023 (ATL, DEN, DFW, LAX, ORD). Data collection spanned September 2023 through January 2025. The data sample provides a 95% confidence level in the key findings.

To ensure robust analysis, the study employed AI-driven emotion analysis to extract insights from unstructured text data, identifying key themes, trends, and pain points impacting passenger satisfaction. Each theme is quantified on an emotional index ranging from -100 to +100; from very poor to very good. The report focuses on a Trust and Anger Passenger Index as they are highly correlated to the ratings provided by passengers.

The report incorporates Revenue at Risk (RaR) analysis to quantify the financial implications of poor airport experiences. This statistical model measures potential financial losses based on analyzed themes, assuming an average spend of \$40 per passenger. The RaR calculation uses a low-risk probability model, acknowledging that passengers are unlikely to leave the airport once there due to existing travel commitments.

Our analysis reveals that \$695 million in revenue is at risk across these five airports. Unless airports reprioritize customer experience, they risk falling into an 'experience deficit'. By combining passenger emotion data with operational metrics, this methodology provides actionable recommendations for airport leaders to enhance service design, improve customer satisfaction, and drive commercial success.



Airport Benchmark: The Trust Index

Which Airport is most Trusted by Passengers?

Based on the analysis, the Airport Trust Index Benchmark is **36**. Hartsfield-Jackson Atlanta International (ATL) and Denver International (DEN) are jointly the most trusted at 6% above benchmark. O'Hare International (ORD) is rated the least trusted at 11% below benchmark, revealing significant variation across America's five busiest airports.

Airport	Trust Index	Comparison to Benchmark
Hartsfield-Jackson Atlanta International (ATL)	38	6%
Denver International (DEN)	38	6%
Dallas/Fort Worth International (DFW)	37	3%
Los Angeles International (LAX)	36	-
O'Hare International (ORD)	32	-11%

The Trust Index operates on a scale of 0-100

Key takeaway: No one airport is 'owning' the category of most trusted passenger experience. This is the new battleground for airports to compete to retain customers, grow revenue and gain competitive differentiation.



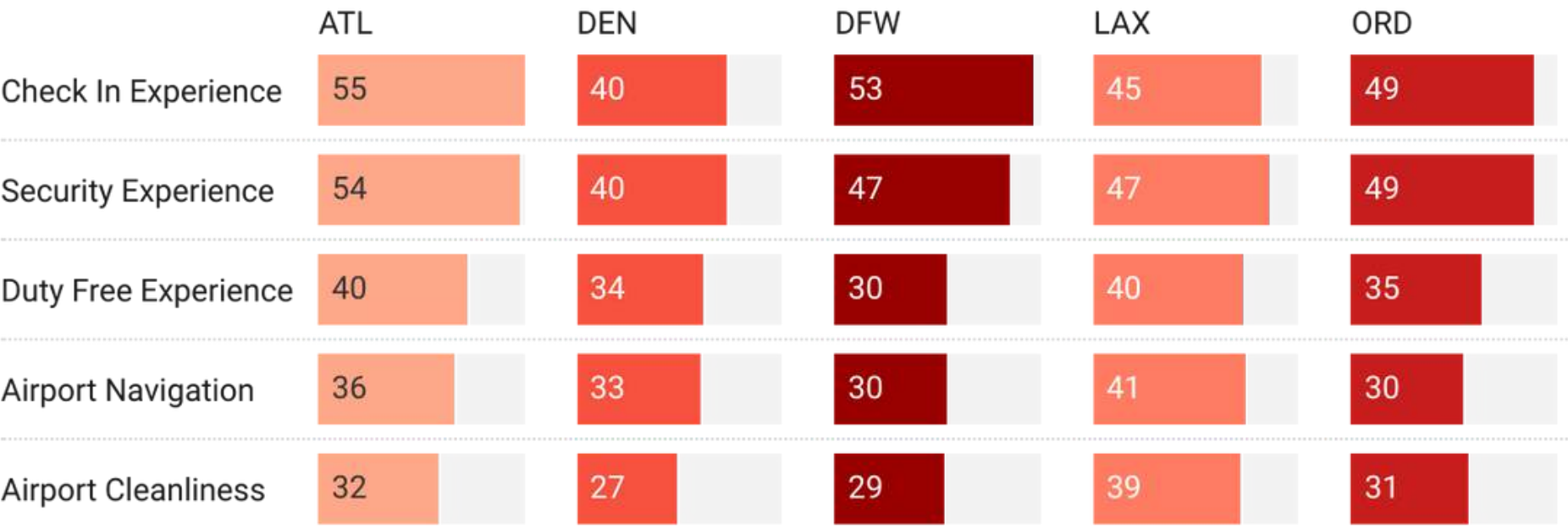
Passenger Journey

Passenger journeys across major airports are ripe for disruption given the significant friction at key touchpoints, with check-in and security generating peak scores on our Passenger Anger Index. The implication is that 'revenue at risk' (RaR) increases the more time passengers are trapped at these high-anger stages. These 'Joy' blockers represent a potential \$188.7m in RaR and impact on average 15 passengers in every 100 journeys.

Passenger Anger Index

Index rating on a scale of 0-100

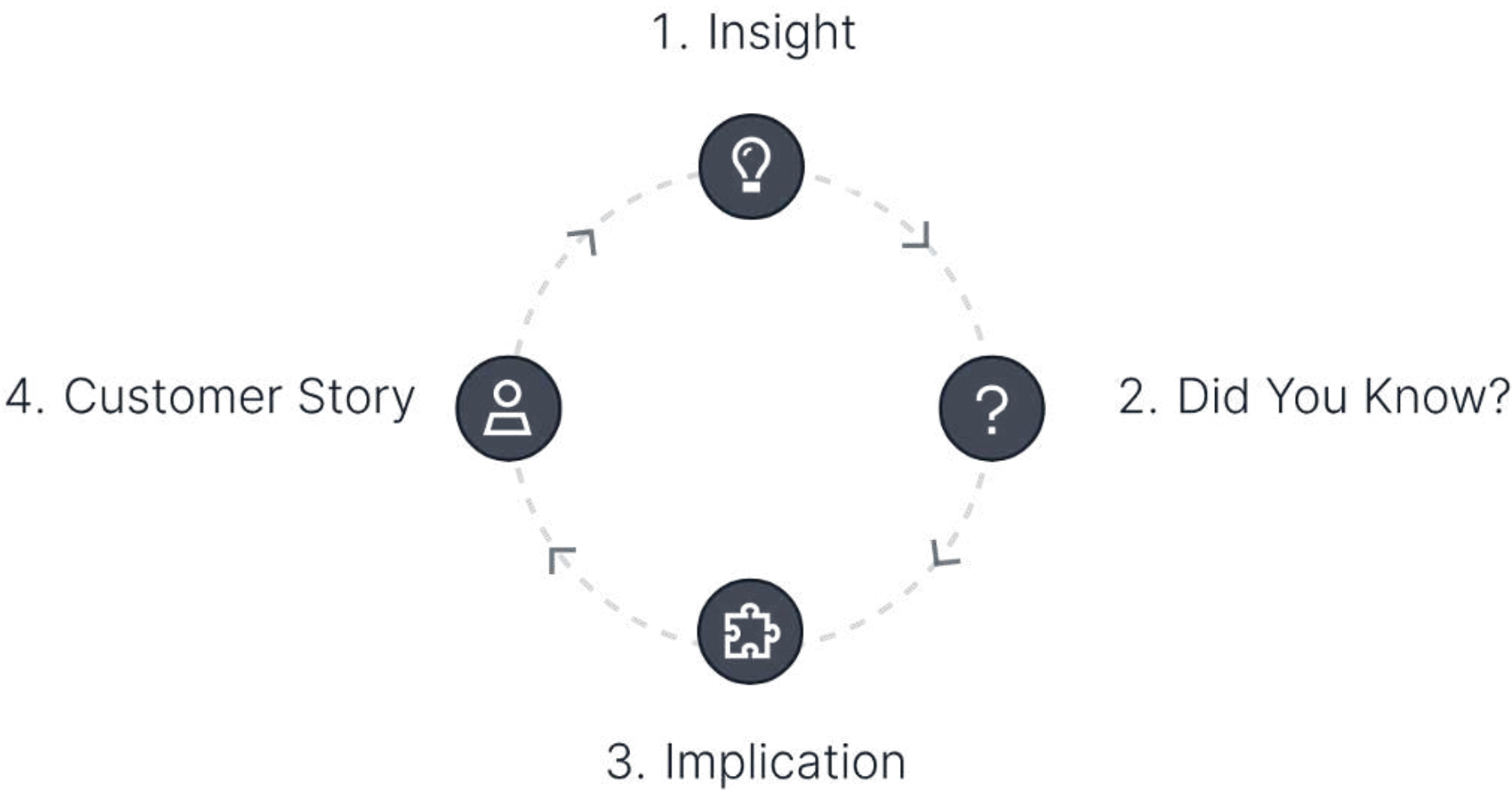
ATL DEN DFW LAX ORD



7 Executive-Ready Insights

This report presents 7 Executive-Ready Insights designed to rebuild customer trust and mitigate passenger frustration throughout the travel journey. Each insight is structured to provide immediately actionable recommendations alongside quantified financial implications, enabling leadership to drive strategic outcomes.

Our analysis reveals critical opportunities across the passenger journey, representing \$695M in revenue at risk (RaR). Addressing these strategically offers airports clear pathways to both protect and grow revenue while enhancing customer experience. In this way you can prioritise action based on passenger emotion and business impact.



THEMES AND INSIGHTS

THEMES	ADORESCORE	VOLUME	SWOT	REVENUE AT RISK
1 Improve Dining Options	-20 POOR	13%	Weakness	\$114.18M
2 Overhaul Staff Interactions	-38 V POOR	11%	Weakness	\$139.74M
3 Reprioritise Airport Cleanliness	-19 POOR	10%	Weakness	\$81.06M
4 Re-imagine Passenger Security	-38 V POOR	9%	Weakness	\$110.74M
5 Optimise Parking & Transportation	-40 V POOR	8%	Weakness	\$103.58M
6 Improve Airport Navigation	-19 POOR	8%	Weakness	\$67.57M
7 Re-imagine airport check-in	-39 V POOR	6%	Weakness	\$78.17M

Improve dining options to rebuild trust
and shorten wait times at major US
airports

Did you know?

Mentions of Dining Options account for 13% of responses, driving **8% more Apprehension**. Unsatisfied travelers express frustration over lack of dining options, especially late at night, at major US airports as well as food prices.

Implication

Improve dining options and customer service to reduce waiting times and rebuild trust, potentially reducing up to \$114.18M in Revenue at Risk.

Weakness
Weakness
Weakness
Weakness
Weakness
Weakness

DECISION READY INSIGHT 1

“Horrible food choices... and staff here are beyond rude,”

“Crowded, food is way too expensive. \$2.50 for one banana!”

“It's 9:45 p.m. there are people all over this airport and every restaurant is closed. Completely unsatisfactory. Who the hell runs this place?”

Rebuilding trust through empathetic staff interactions

Did you know?

Mentions of Staff Interaction account for 11% of responses, driving **30% more Apprehension**. Customers report unhelpful staff and difficulties navigating crowded areas due to insufficient staffing.

Implication

Improve staff interactions to rebuild trust and potentially reduce Revenue at Risk by up to \$139.74M. Train staff in customer service skills and provide incentives for positive interactions.

Weakness
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Weakness
Weakness

DECISION READY INSIGHT 2

“Extremely rude staff across the board in TSA, no one readily available to assist in navigating the airport, wheelchair assistants not helpful. Got to airport three hours early and still missed first flight. Atlanta really needs another airport to take pressure off Hartsfield Airport in Atlanta.”

“4 hour layover, I had some time to kill. Most employees I encountered were very rude and not very helpful.”

“Very confusing airport. We were a bit lost but the ground staff was not helpful at all. The security is very rude. After a long haul flight, this is our first entry point to USA. We didn't feel welcomed at all.”

Rebuilding trust through improved airport cleanliness

Did you know?

Mentions of Airport Cleanliness account for 10% of responses, driving **17% more Disgust** than the overall dataset.

Implication

Address this 'Reprioritise Airport Cleanliness' to rebuild trust and potentially reduce Revenue at Risk by up to \$81.06M. Enhance cleaning services to improve passenger experience and satisfaction.

Weakness
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Weakness
Weakness

DECISION READY INSIGHT 3

“TBIT arrival, bathrooms were dirty.. Bag transfer area smelt like weed... Employees were rude... TSA at Delta Terminal 3 needs a life... rude, sad and treated us like we are stupid.. Delta SkyClub is always a good place to detach from the airport negative vibes....”

“Bathrooms were dirty, with lines for the stalls. The faucets barely worked, and there was only one functioning soap dispenser.”

“I don't give 1 stars often. Life is hard and reviewers are way too harsh. But this airport is a tragedy. There is no easy way to get from terminal to terminal. No trams or moving walkways. Nothing is open past 9. Very dirty. Gate L5 has mice EVERYWHERE.”

Improve security etiquette to boost
customer trust

Did you know?

Mentions of 'Security Experience' account for 9% of responses, driving **6% less Trust**. Friendly and efficient security processes noted in customer feedback.

Implication

Improve parking & transportation to regain trust, reduce wait times, and potentially save up to \$103.58M in Revenue at Risk. Rethink transport hub flows and accessibility. By addressing staff rudeness this will deliver a more welcoming airport experience.

Weakness
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Weakness

DECISION READY INSIGHT 4

“The TSA security checkpoint after an international flight was a nightmare. They are rude, verbally hostile, and not organized. All passengers with US passports with ir without TSA pre were forced to do the same line.”

“Your security is absolutely horrible, and rude dealing with international flights... y'all still think everyone is a terrorist and this airport is trash. Do better.”

“Security is horrible. The TSA is very rude, and there is no plan for improvement.”

Improve parking and transportation
for increased guest trust

Did you know?

Mentions of Parking & Transportation account for 8% of responses, driving **7% less Trust**. Customers share mixed experiences, praising good signs of transportation but express frustration with finding hotel shuttles.

Implication

Improve airport navigation and customer service to rebuild trust, reduce Revenue at Risk by up to \$67.57M, and mitigate frustration for passengers.

Weakness
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Weakness
Weakness

DECISION READY INSIGHT 5

“Always busy and never organized or management correctly Car traffic is crazy parking lots Always packed very unusual high prices for 1 night parking Very disappointed Always to get inside ontime,,

“Horrible no place to park. International terminal Tom Bradley parking has converted to a valet parking of \$75. What a highway robbery and top of that they have sealed off regular parking and you can't park so where else should we go when we come to the airport?,,

“Terminal 5 short-term parking n access to terminal are now terrible because of construction. Allow time to find parking n walk a long distance to terminal. Signs are not very helpful.,,

Improve airport navigation for less apprehension and increased trust

Did you know?

Mentions of Airport Navigation account for 8% of responses, driving **16% more Apprehension**. Confusing airport layouts and long wait times contribute to this emotion.

Implication

Improve airport navigation and customer service to rebuild trust, reduce Revenue at Risk by up to \$67.57M, and mitigate frustration for passengers.

Weakness
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DECISION READY INSIGHT 6

“ 2024: Still awful and incredibly confusing trying to exit / find your ride. 2017: Worst airport I have ever been to. Layout is awful, especially if you are traveling with children.”

“ Airport was a nightmare to navigate and had people yelling out where to go for certain. Flights, gates, TSA, etc. Not an airport I would fly into.”

“ This is the most disorganized mess of an airport in the entire US. The signage is NON-Existent. Good luck figuring out where anything is once you land! The airport employees are nowhere to be found. The one we did find was incredibly rude. Horrible experience, never flying into this airport again.”

Improve check-in process training for
more efficiency and improved
experiences

Did you know?

Mentions of Check In Experience account for 6% of responses, driving **7% less Trust** compared to the overall dataset. Key elements of process, people and technology challenges contribute to this.

Implication

Rebuild trust at check-in by training staff on effective communication and proper procedures to minimize confusion and rudeness, potentially saving up to \$78.17M in potential revenue losses.

Weakness
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Weakness

DECISION READY INSIGHT 7

“Probably one of the most disorganized check in processes I've seen out of an airport. Everyone of staff checking in was incredibly rude and often staff members were telling people contradicting instructions that resulted in a large amount of confusion.”

“They don't tell you if the bag tag needs to be on a large or a small checked bag. The employees said we should have known with “LOB” and were very rude when we didn't know this.”

“Delta has the WORST customer service at this airport. There was a guy with dreads that was scanning boarding passes while I was boarding my flight to FLL at 12pm and he was extremely rude and nasty. Absolutely terrible. Please hire better staff Delta.”

3 Key Takeaways

1 Reimagining the customer journey from 'as is' state

To reimagine the passenger journey effectively, airports must first document their current 'as is' state to identify critical transformation opportunities. Our analysis clearly highlights check-in and security as priority areas where concentrated efforts will yield the highest impact on overall airport experience.

2 Quantify the emotional experience gap

The Harvard Business Review suggests that up to 90% of consumer decisions are emotionally driven. By prioritizing the emotional impact created throughout the passenger journey, you can significantly influence the overall experience. Shift your focus from purely numerical metrics, like NPS, to developing a deeper understanding of passengers as individuals with unique needs and feelings.

3 Link the experience gap to revenue at risk for impact

Linking emotional intensity to specific touchpoints in the passenger journey is powerful, but translating this into financial impact is key. Revenue at risk analysis, which maps friction points to potential financial losses, provides a clear way to secure CFO support for experience improvements.



The Data Behind The Report

Watch this 2-minute walkthrough of how emotion AI transformed unstructured text feedback into the quantifiable metrics and insights underpinning this report.

ADOREBOARD

Datasets

Comments

Emotion Analysis

SWOT

Theme Analysis

Journey Mapping

Zamena

Zamena

FILTERS

Search for Comments...

SAVE

SEARCH

2 Themes: 0 Selected

INSIGHTS

All

Staff Interactions • Check-In Attendants: 0 Selected

MERGE

+ CREATE

EDIT

COPY

DELETE

MOVE

EXPORT

DELETE

Search Themes

SELECT ALL

NAME

VOL

SCORE

Reprioritise Airport Clean...

Vol 1904 (10%)

-19

Re-imagine Passenger Sec...

3

Vol 1882 (9%)

-38

Optimise Parking & Transp...

5

Vol 1641 (8%)

-40

Parking

Vol 1017 (5%)

-38

Shuttle

Vol 470 (2%)

-41

Taxi

Vol 351 (2%)

-41

Bus

Vol 249 (1%)

-42

EV Charging

Vol 30 (<1%)

-41

SELECT ALL

COMMENTS VIEW

METADATA

SORT BY

Probably one of the most disorganized check in processes I've seen out of an airport. Everyone of staff checking in was incredibly rude and often staff members were telling people contradicting instructions which resulted in a large amount of confusion.

4

They don't tell you the bag tag needs to be on a large or a small checked bag. The employees said we should have known with "L" bags and were very rude when we didn't know this.

4

The person at the check in from America airlines was very rude 🙄, I'm very disappointed.

3

Worst airport the day after a 'snowstorm' which paralyzed the whole city shutting down as though it was the apocalypse. The lines were horrendous and it took 4 hours to clear security despite being told by check in agents that I could make it. Staff were extremely rude and my knee was in terrible shape, got lied to time and again and treated with disrespect. Absolutely a bummer and so many disgruntled passengers everywhere. Never going through this airport ever again!

6

We had arrived for our flight and forgot to check in which was my fault, but the lady who Was giving us service was so freaking rude!! I don't think I've ever encountered someone so rude before, so just be aware they don't care!

3

00:42

Visit: adoreboard.com/v/airport



Still second-guessing your insights? Get unshakable clarity, fast.

In today's experience-driven economy, organisations face large volumes of unstructured text feedback and review data. While rich with potential insights, traditional analysis methods are slow, biased, and fail to deliver actionable insights linked to impact.

Adoreboard's Emotion AI platform transforms how organizations understand and act on customer and employee feedback, delivering measurable business outcomes.

By analysing emotion rather than sentiment—and applying exploratory analysis across 100% of data—Adoreboard uncovers the real drivers behind NPS and satisfaction scores, linking insights to actions that improve experience, manage risk, and drive revenue.



About Adoreboard: Founded in 2011 at Queen's University Belfast, a leading Russell Group university, Adoreboard's emotion AI technology is based on pioneering research in data analytics, emotion, and behavioural science. Today, we help global organizations turn customer and employee feedback into revenue-driving insights.



Discover how emotion AI drives ROI
Visit: www.adoreboard.com