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The emotional experience gap

Quantifying passenger trust to drive passenger revenue impact

What 20,000 passenger reviews across some of North America's largest airports reveal about the emotional experience gap, the non-aeronautical revenue it erodes, and what it means for airports planning for growth.



With a foreword by **Solomon Wong**, Chief Executive Officer, InterVISTAS

01

Foreword

**Solomon Wong**

Chief Executive
Officer
InterVISTAS



Boeing's most recent forecasts continue to point to international traffic growing as a proportion of total passenger traffic. At the same time, the global economy and tourism trends carry real headwinds. Taken together, they make a data-centric approach to customers more important for airports, not less.

That approach needs precision, and not only in how customer satisfaction is collected. It needs to understand the emotional ties a journey creates, because those ties decide whether a passenger spends, returns and recommends.

Upwards of 5.5% per annum growth is forecasted just for Southeast Asia to North America. Africa, Middle East and Latin America will have also strong growth rates to Canadian and US airports. There is a need to identify passenger preferences and spending patterns quickly enough to tailor the journey to them. For airport operators, that is where non-aeronautical revenue and brand loyalty are won or lost.

This means that we need to bring a sharp focus into the journey – from the time a travel authorization/visa is applied for through to the journey. Broader aviation safety and security are coming back into sharp focus, and these are the stress points passengers are likely to feel as part of any discomfort with flying. How we can alleviate the emotional stress points are critical: biometrics and baggage imaging are changing how passengers cross borders, and initiatives such as International Remote Baggage Screening and One Stop Security give airports a growing set of options to design an integrated end-to-end journey rather than a sequence of checkpoints.

Our partner Adoreboard has led the way in showing the value of emotional touchpoints. Together with Engine, it analyzed 20,000 passenger reviews across five of North America's largest airports and put a figure on the emotional experience gap: a \$695 million Passenger Revenue Impact, eroding the non-aeronautical revenue that airports increasingly depend on. This paper presents that analysis alongside InterVISTAS' aviation perspective.

Our shared view is that integrated data, planning and innovation are needed to connect the dots, so that hub airports and regional airports alike can translate emotional touchpoints into passenger trust and airport revenue. I hope the insights that follow are useful as you consider your own passenger experience program.

Solomon Wong Chief Executive Officer, InterVISTAS

02 Executive summary

Five of North America's largest 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 carrying a \$695M Passenger Revenue Impact (PRI): non-aeronautical revenue eroded as frustrated passengers spend less.

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.



"Scores tell you what happened. Emotion tells you what happens next. When the emotional experience gap shows up as lost non-aeronautical revenue, passenger experience stops being a cost line and becomes a revenue decision."

Chris Johnston, Chief Executive Officer, Adoreboard

413M

travelers served annually
by ATL, DEN, DFW, LAX
and ORD

20,000

passenger reviews
analyzed, September
2023 to January 2025

7

underperforming drivers
identified across the five
airports

\$695M

Passenger Revenue
Impact: non-aeronautical
revenue eroded by
emotional experience
gaps

Methodology

This report is based on an in-depth analysis of 20,000 passenger reviews from five of North America's largest airports (ATL, DEN, DFW, LAX, ORD), the five busiest in the United States as ranked by the ACI World Airport Traffic Dataset 2023. 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 Passenger Revenue Impact (PRI) analysis to quantify the financial implications of poor airport experiences. This statistical model measures the erosion of non-aeronautical revenue (retail, food and beverage, parking and services) based on analyzed themes, assuming an average spend of \$40 per passenger. The PRI 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 a \$695 million Passenger Revenue Impact 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.

READING THE INDEX



Each theme is quantified on an emotional index from -100 (very poor) to +100 (very good). The seven underperforming drivers in this report score between **-40 and -19**.

\$695M

PASSENGER REVENUE IMPACT

Passenger Revenue Impact (PRI) is the non-aeronautical revenue an airport loses when emotional friction cuts passenger spend: retail, food and beverage, parking and services. It is modeled from 20,000 reviews at an average spend of \$40 per passenger, using a low-risk probability model. Every dollar of PRI is a dollar of non-aeronautical revenue eroded.

03 Airport benchmark: the Trust Index

36

Airport Trust Index benchmark across the five airports

Which airport is most trusted by passengers?

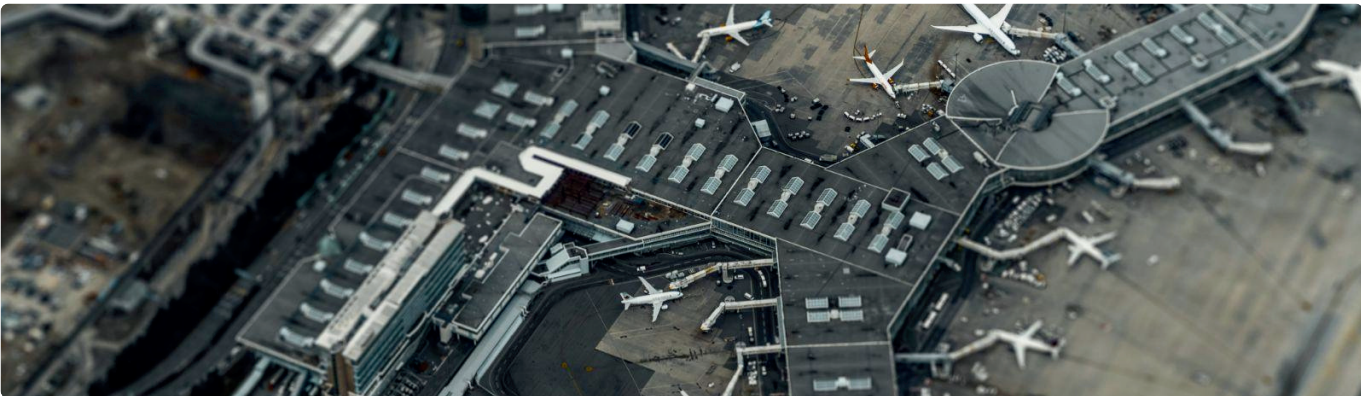
Based on the analysis, the Airport Trust Index Benchmark is 36. Hartsfield-Jackson Atlanta International (ATL) and Denver International (DEN) are jointly the most trusted at 6% above benchmark. O'Hare International (ORD) is rated the least trusted at 11% below benchmark, revealing significant variation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

AIRPORT	TRUST INDEX (0-100)	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	At benchmark
O'Hare International (ORD)	32	-11%

Based on 20,000 passenger reviews. The tick on each bar marks the benchmark of 36.

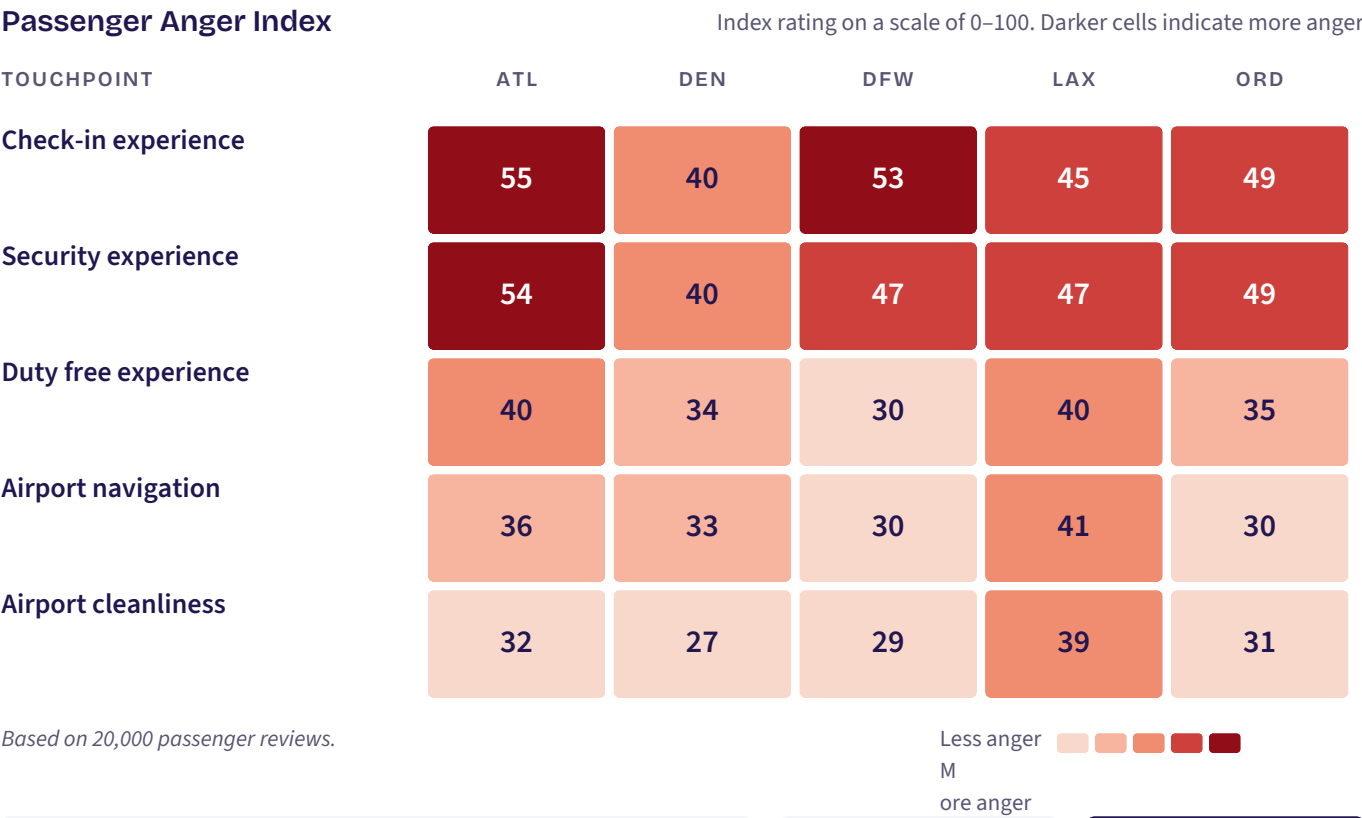
KEY TAKEAWAY

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.



04 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.



IMPLICATION

The implication is that Passenger Revenue Impact (PRI) increases the more time passengers are trapped at these high-anger stages: dwell time that could be spent in retail and dining is lost. These 'Joy' blockers represent a potential \$188.7m in PRI and impact on average 15 passengers in every 100 journeys.

\$188.7m

potential PRI from 'Joy' blockers at check-in and security

15 in 100

journeys affected on average

05 Where the journey breaks

Trust erodes up to the checkpoint. Apprehension builds beyond it.

Each of the seven friction themes carries a distinct emotional signature. The three that cost passengers trust all sit at or before the security checkpoint. Beyond it, the dominant emotion shifts to apprehension, with disgust reserved for cleanliness. Circles are sized by Passenger Revenue Impact.

\$695M
PASSENGER REVENUE IMPACT

\$292.49M

Curb to checkpoint, where trust erodes: parking and transport, check-in and security

\$402.55M

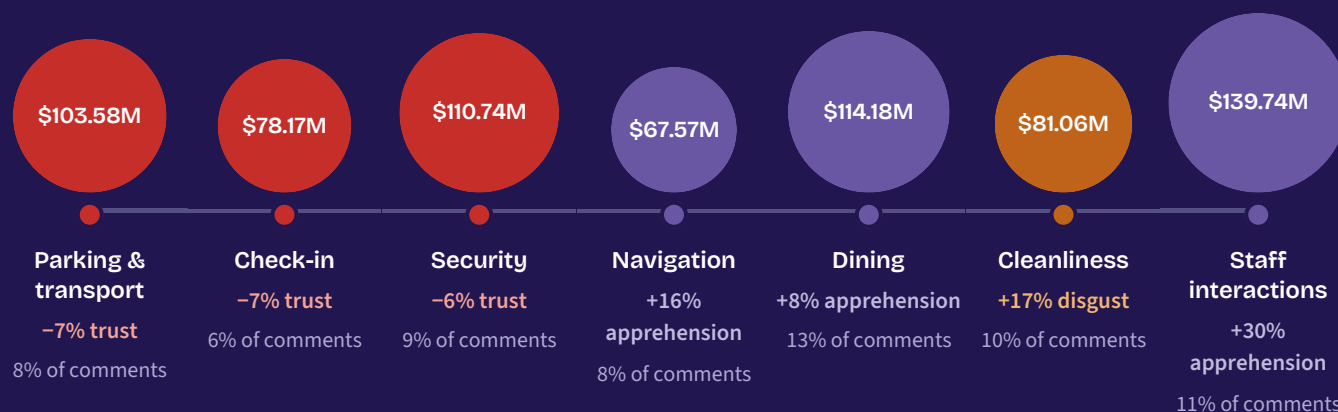
Beyond the checkpoint, where apprehension builds: navigation, dining, cleanliness and staff

CURB TO CHECKPOINT · TRUST
ERODES

\$292.49M

BEYOND THE CHECKPOINT · APPREHENSION BUILDS

\$402.55M



PASSENGER JOURNEY, CURB TO GATE →

Less trust

More apprehension

More disgust

Expert viewpoints



Solomon Wong

Chief Executive
Officer
InterVISTAS



THE AVIATION VIEW

“As routes open up, passengers become more discerning. For hubs, a connection is no longer a given; it is a choice, and that calls for a new value proposition.

More direct services and more ways to route a trip mean passengers can compare airports as readily as they compare airlines. Hubs that once competed on schedule and geography now compete on the experience of the connection itself, as well as the ease of destressing the journey – from visa issuance processes to home/hotel. Leaders will blend together a mix of people, process and technology solutions – with data showing where confidence is won and lost along that journey.



Chris Johnston

Chief Executive
Officer
Adoreboard



THE EMOTION DATA VIEW

“Passengers tell you exactly where trust breaks. They just don't do it in a survey box. Twenty thousand reviews gave us seven drivers and a \$695 million figure a CFO can act on.

Trust and Anger track passengers' own ratings more closely than any other emotion, which makes them the right lens for an airport benchmark. Passenger Revenue Impact then maps each friction point to the non-aeronautical revenue it erodes, so the emotional experience gap becomes a line a finance team can read.



David Pinder

Design Director
Engine Service Design



THE SERVICE DESIGN VIEW

“An emotion score is a brief, not a verdict. Map the 'as is' journey, find the moments where apprehension builds, and redesign those first. Re-imagining the experience is where the opportunity is.

Staff interactions carry 30% more apprehension than the dataset as a whole, and navigation 16% more. Those are design problems before they are training problems: clearer wayfinding, visible help at the moments of doubt, and check-in and security processes passengers can understand without being told twice. Fixing them one by one recovers revenue; re-imagining the journey end to end changes what an airport is worth to the passenger.

06

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 a \$695M Passenger Revenue Impact (PRI). Addressing these strategically offers airports clear pathways to both protect and grow revenue while enhancing customer experience. In this way you can prioritize action based on passenger emotion and business impact.

#	THEME	TRUST SCORE	VOLUME	PASSENGER REVENUE IMPACT
1	Improve Dining Options	-20 POOR	13%	\$114.18M
2	Overhaul Staff Interactions	-38 VERY POOR	11%	\$139.74M
3	Reprioritize Airport Cleanliness	-19 POOR	10%	\$81.06M
4	Re-imagine Passenger Security	-38 VERY POOR	9%	\$110.74M
5	Optimize Parking & Transportation	-40 VERY POOR	8%	\$103.58M
6	Improve Airport Navigation	-19 POOR	8%	\$67.57M
7	Re-imagine Airport Check-in	-39 VERY POOR	6%	\$78.17M
Total Passenger Revenue Impact				\$695M

Trust Score ranges from -100 (very poor) to +100 (very good). All seven themes are weaknesses in the SWOT analysis.
Volume is each theme's share of passenger comments.

1

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

\$114.18M

Passenger Revenue
Impact

+8% **apprehension**

13% of comments

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 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 Passenger Revenue Impact.

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

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

2

Rebuilding trust through empathetic staff interactions

\$139.74M

Passenger Revenue
Impact

+30% **apprehension**

11% of comments

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 Passenger Revenue Impact by up to **\$139.74M**. Train staff in customer service skills and provide incentives for positive interactions.

“ 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.

3

\$81.06MPassenger Revenue
Impact**+17% disgust**

10% of comments

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 'Reprioritize Airport Cleanliness' to rebuild trust and potentially reduce Passenger Revenue Impact by up to **\$81.06M**. Enhance cleaning services to improve passenger experience and satisfaction.

“ 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.

4

\$110.74MPassenger Revenue
Impact**-6% trust**

9% of comments

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

Re-imagine passenger security to rebuild trust and potentially reduce Passenger Revenue Impact by up to **\$110.74M**. The friendly, efficient checkpoints passengers already praise set the standard to replicate.

“ The TSA security checkpoint after an international flight was a nightmare. They are rude, verbally hostile, and not organized.

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

5

\$103.58MPassenger Revenue
Impact**-7% trust**

8% of comments

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

“

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.

“

Horrible no place to park. International terminal Tom Bradley parking has converted to a valet parking of \$75.

6

\$67.57MPassenger Revenue
Impact**+16% apprehension**

8% of comments

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 Passenger Revenue Impact by up to **\$67.57M**, and mitigate frustration for passengers.

“

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.

“

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.

7

\$78.17MPassenger Revenue
Impact**-7% trust**

6% of comments

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.

“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.



07

Key takeaways

TAKEAWAY

1

Reimagining the customer journey from the '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.

TAKEAWAY

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.

TAKEAWAY

3

Link the experience gap to Passenger Revenue Impact

Linking emotional intensity to specific touchpoints in the passenger journey is powerful, but translating this into financial impact is key. Passenger Revenue Impact analysis, which maps friction points to the non-aeronautical revenue they erode, provides a clear way to secure CFO support for experience improvements.

THE DATA

The data behind the report: a 2-minute walkthrough of how emotion AI transformed unstructured text feedback into the metrics in this paper is at adoreboard.com/v/airport.

08 About the authors

InterVISTAS

InterVISTAS is a strategic aviation consultancy. In this paper it contributes the aviation sector perspective: airport operational context, the evolution of security and border processes, and the executive relationships through which insight becomes action.

Adoreboard

TURN CUSTOMER EXPERIENCE INTO REVENUE IMPACT

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 behavioral science. Today, we help global organizations turn customer and employee feedback into revenue-driving insights.

engine

Engine Service Design is a customer experience consultancy. Design Director David Pinder co-authored the original analysis, bringing the service design perspective: turning passenger insight into redesigned journeys and measurable change.

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Analysis and passenger insights: Adoreboard and Engine, Airport Revenue at Risk Report 2025 (May 2025). Passenger Revenue Impact figures assume an average spend of \$40 per passenger and a low-risk probability model. Passenger quotes are reproduced verbatim from public reviews.