



Sentiment and Spend: How Traveller Experience Drives Commercial Outcomes (Large Airports)

July 2025 | V1.0

'25



About Prescient Research

Since 2021, Prescient Research has been tracking the performance of Australian and New Zealand airports through traveller sentiment. During this time, we have collected over 4,058 individual responses directly from travellers.

These responses have been gathered from across Australia and New Zealand through four different paid online panels which are ISO 20252 compliant. To ensure the respondent provides accurate information, they need to have visited the nominated airport within the last month.

4,058 Responses

28 Airports

7-minute Duration

01

Sentiment –
How satisfied are travellers
with their airports?

+

Spend –
How do travellers perceive
airport spending?

02

=

03

How does sentiment
relate to spend?



04

How do we encourage
increased spend?

Size Definitions

The following definitions are used throughout this presentation:

AIRPORT SIZES

01

Small Airports

Airports with fewer than 5 gates.

02

Medium Airports

Airports with 5-10 gates.

03

Large Airports

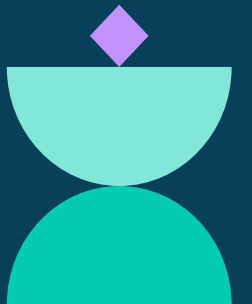
Airports with 11 or more gates.

01

How satisfied are travellers with their airports?



We unpack traveller sentiment by airport size, travel purpose and demographics, revealing who feels most positive – and where experience gaps persist.



How do we measure sentiment?

Net Promoter Score+ (NPS+) is a methodology developed by Prescient Research – tailored to suit airports and physical places.

NPS+ measures more than a likelihood to recommend. It includes traveller satisfaction, their level of preference and loyalty and whether travellers view an airport as better than its competitors.

Combined, these scores form the NPS+ metric, offering a holistic measure of satisfaction designed specifically for physical places.

NPS+ Score = % Promoters – % Detractors



Detractors



NPS+ is expressed as a figure from -100 to +100

Passives



Promoters



A **negative** score signifies there are more detractors than promoters.

A **positive** score signifies there are more promoters than detractors.

How do we measure sentiment?

NPS+ Traveller Sentiment Metrics

CSAT (TRAVELLER SATISFACTION)

Satisfaction

My most recent experience was satisfying.

TRADITIONAL NET PROMOTER

Advocacy

I am likely to recommend [airport] to family, friends and colleagues.

+ SENTIMENT METRICS FOR PLACES

Fulfilment

My most recent experience met my expectations.

Loyalty

I look forward to travelling through [airport] again in the future.

Preference

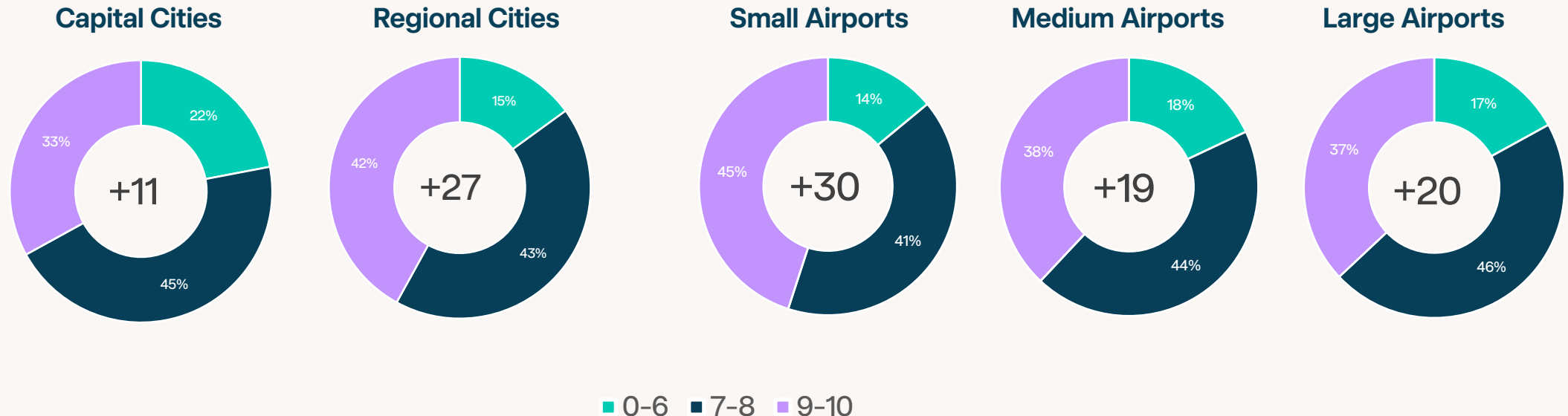
I think my experience at [airport] was better than other airports.

What is the sentiment of Australian travellers with their airports?

Evidence of the Size–Prestige Heuristic is seen in the strong performance of Small airports, which scored +30.

In comparison, Medium (+19) and Large airports (+20) performed similarly, despite their greater scale.

When examining the distribution of scores, Small airports stand out: nearly half of all travellers rated their experience a 9 or 10 out of 10, while only 1 in 8 gave a rating of 6 or below.

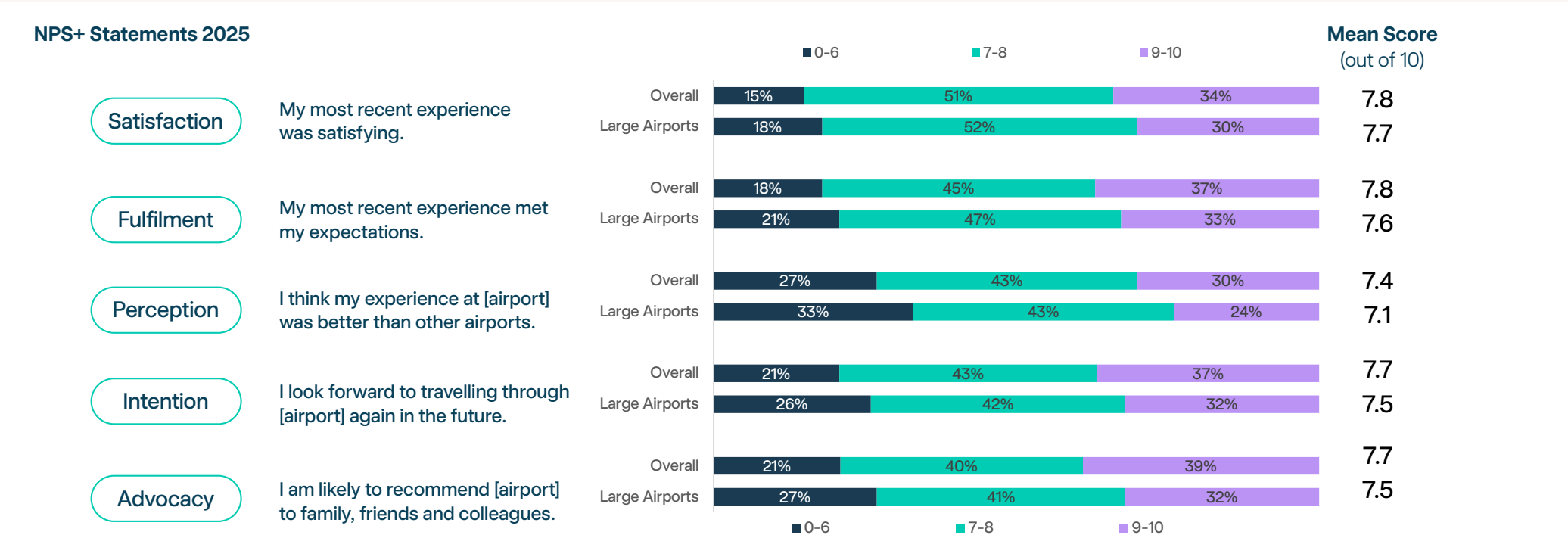


What is the sentiment of Australian travellers with their airports?

Small airports lead on every sentiment measure—scoring higher in Satisfaction, Fulfilment, Intention, and Advocacy.

Their NPS scores are notably stronger, especially for Satisfaction (+32) and Advocacy (+33). This reflects the benefits of simpler, less congested environments and more relaxed traveller experiences.

Medium and Large airports, by contrast, perform similarly – suggesting scale alone doesn’t drive better sentiment and may even work against it when expectations aren’t met.

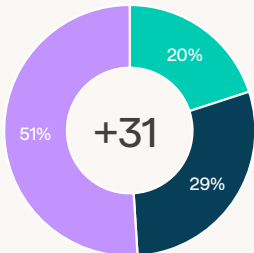


How does sentiment change by purpose of travel?

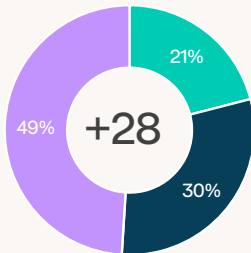
Travel purpose plays a clear role in shaping sentiment. Travellers on business trips report the highest satisfaction, with NPS+ scores reaching the mid-to-high 40s – especially when departing from Small or Regional airports.

Leisure and family visits show moderate sentiment, while those relocating tend to feel more mixed.

Yes, using lounge



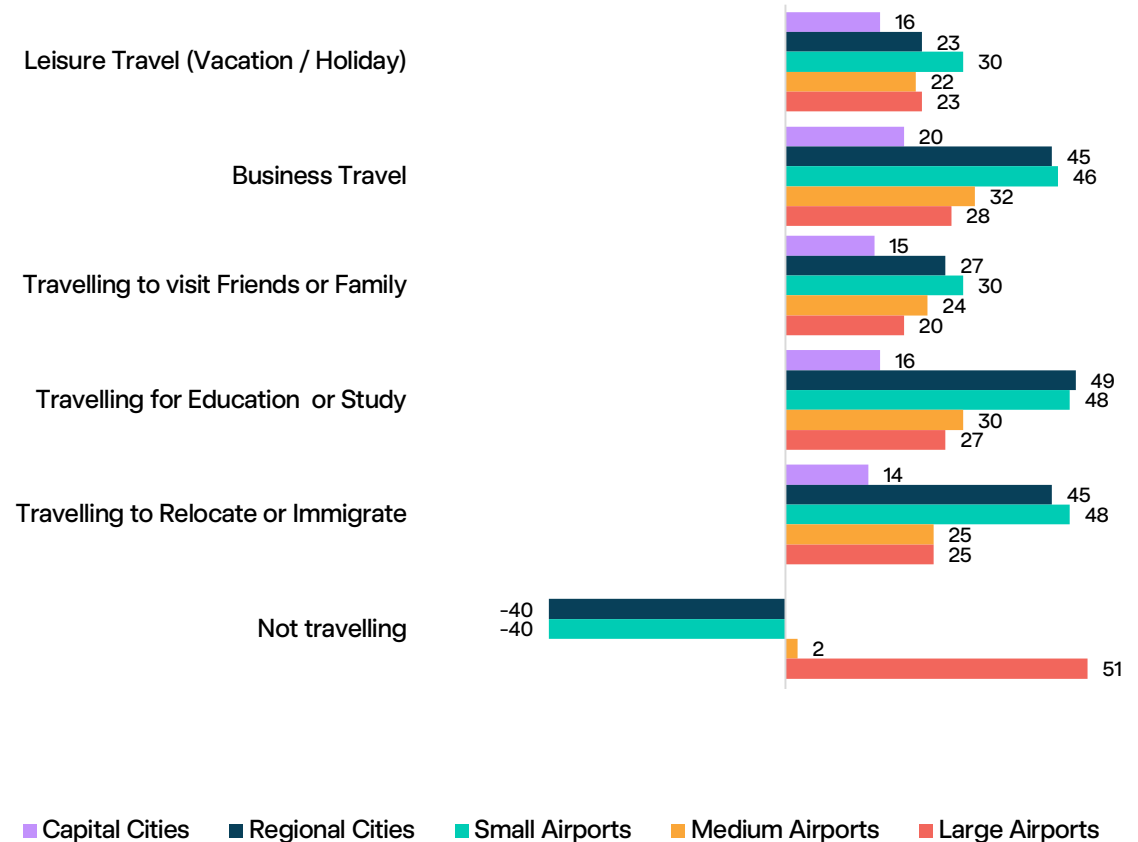
No, not using lounge



0-6 7-8 9-10

49%
Endorsers
30%
Passives
21%
Detractors

NPS+ by Purpose of Travel

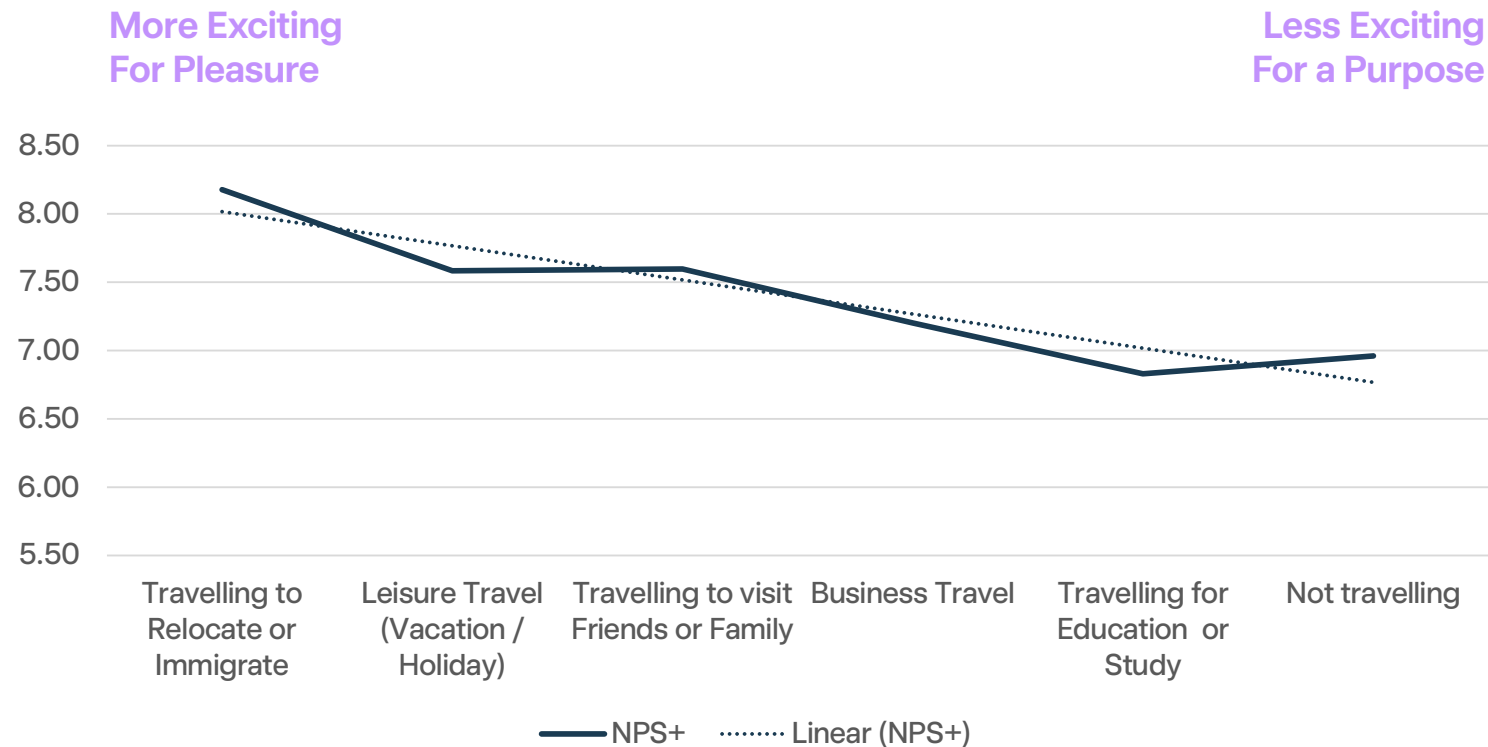


Capital Cities Regional Cities Small Airports Medium Airports Large Airports

How does sentiment change by purpose of travel?

Based on the evidence, there is a relationship between more pleasurable and exciting travel providing a more positive sentiment of the airport.

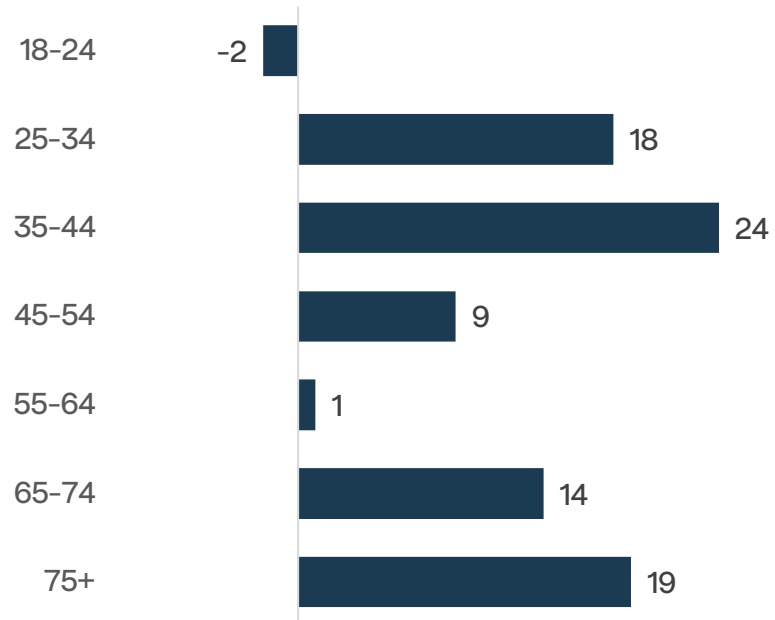
NPS+ by Purpose of Travel



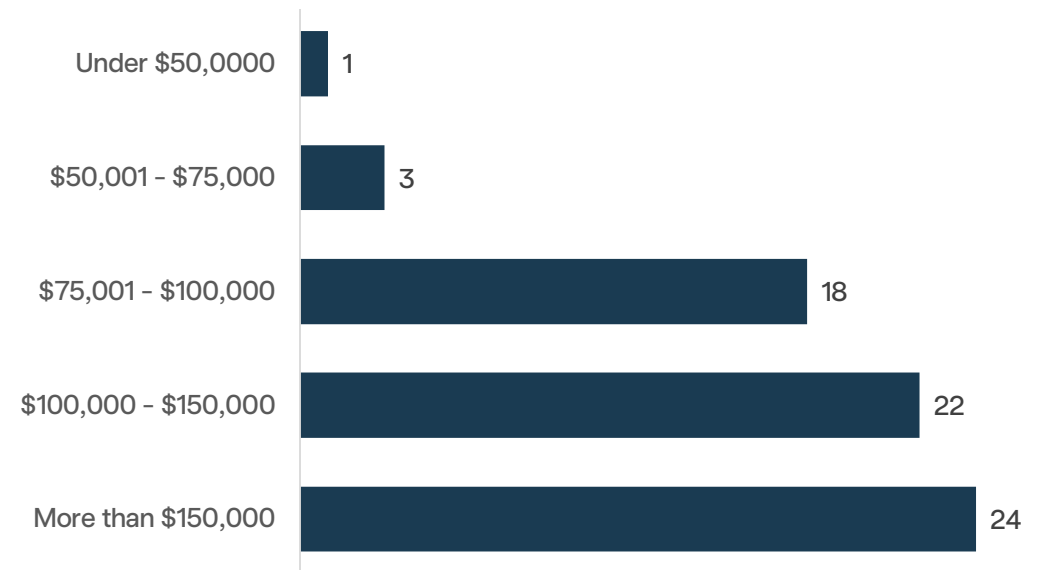
How does sentiment differ by demographics?

Airport sentiment varies across demographic lines. Older travellers report higher satisfaction, with NPS+ peaking among those aged 35-44 and 75+. Younger adults (18-24) are the least positive, returning a negative score (-2).

NPS+ by Age

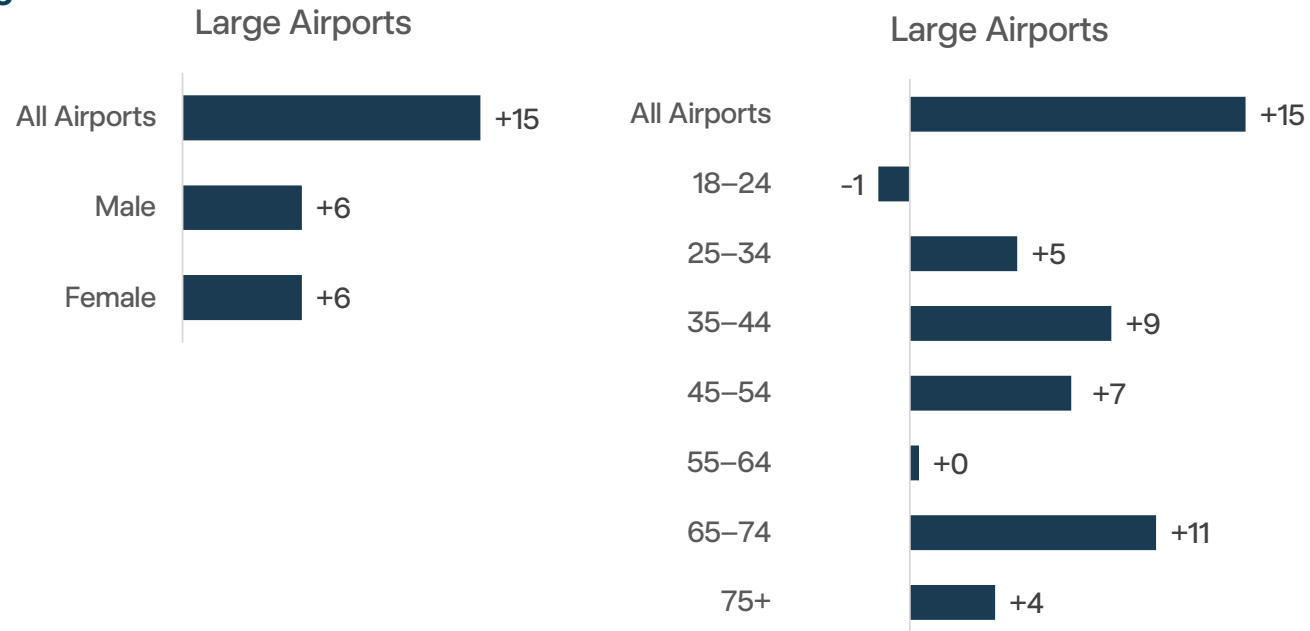


NPS+ by Individual Income (\$AUD per annum)



How does sentiment differ by demographics?

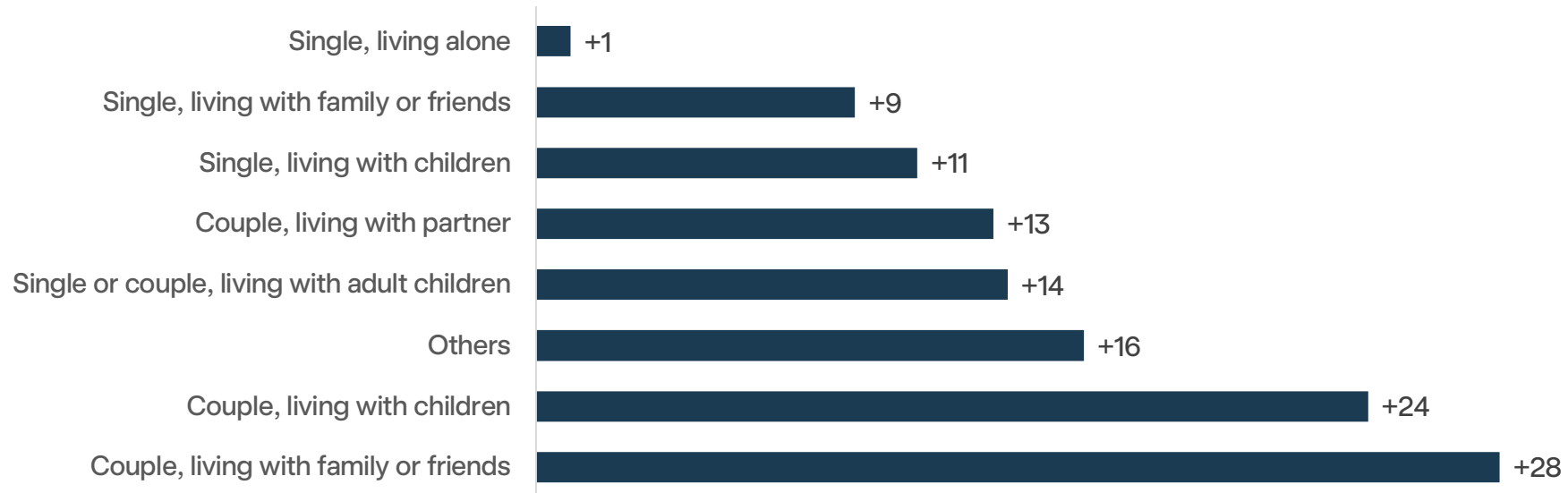
NPS+ by Gender and Age



How does sentiment differ by living situation?

Based on the evidence, sentiment and living situation are correlated. Travelling with children increases sentiment by +10, living with a partner increases sentiment by +12, combining living with children and a partner provides a +23 increase. And, the pinnacle of positive sentiment – living with partner and friends, which provides an increase of +27 points.

NPS+ by Living Situation

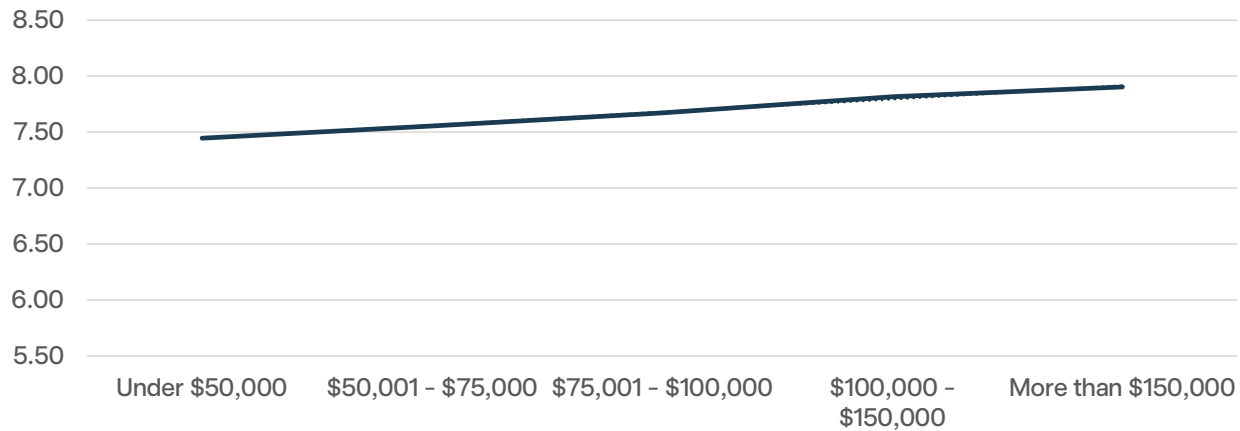


How does sentiment differ by financial capacity?

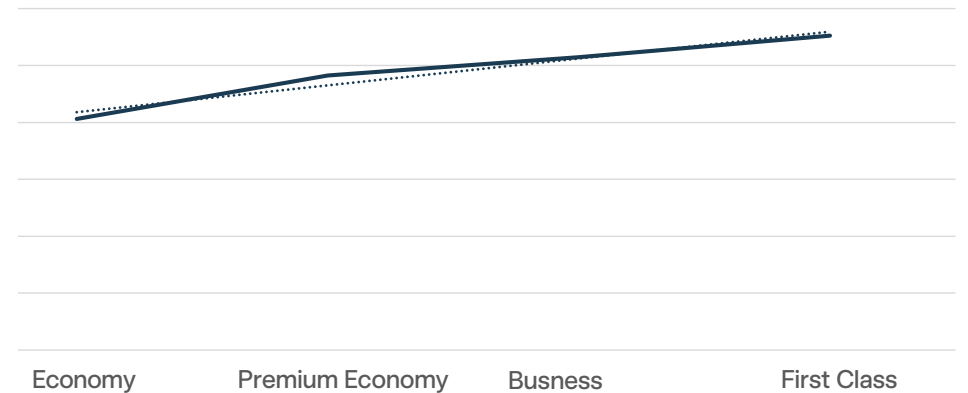
Although modest, there is a link between financial capacity – as measured by household income and travel class. Reassuringly, the extra investment in the premium classes provides a more positive perceived experience.

NPS+ by Financial Capacity

Household Income



Travel Class

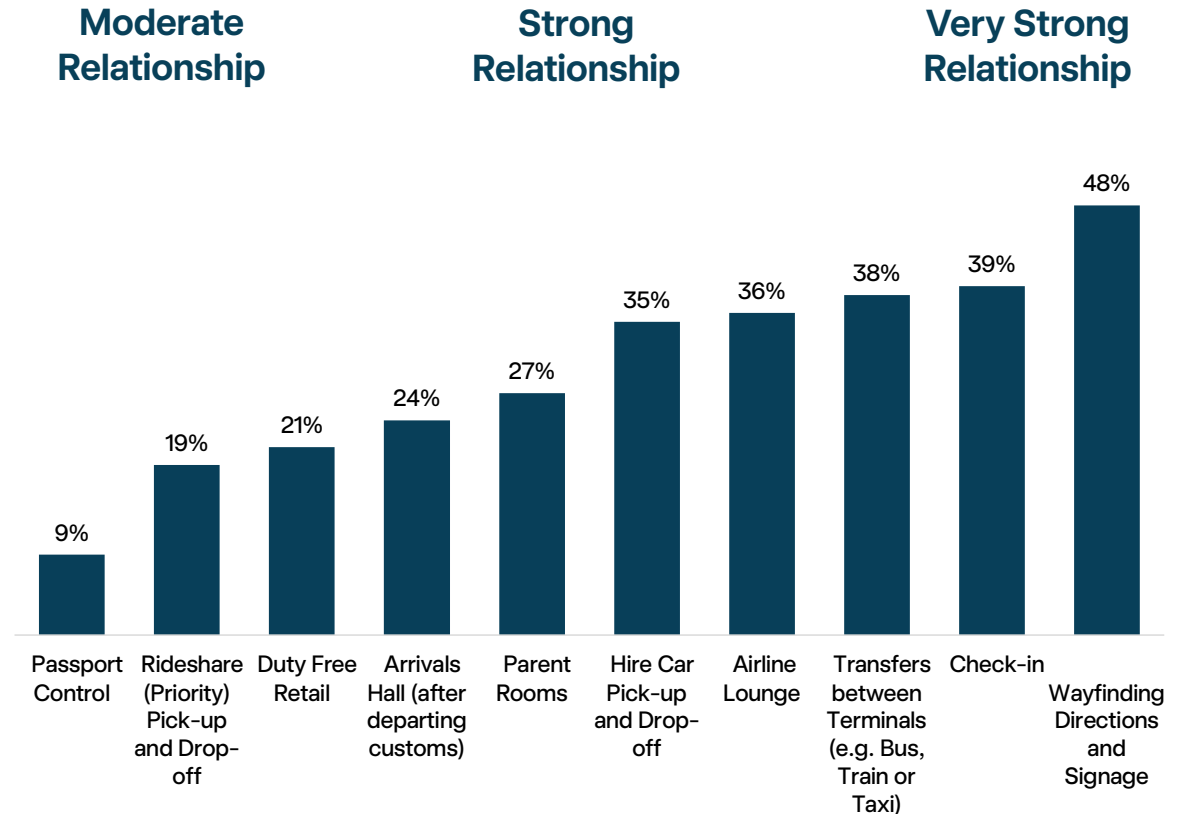


— NPS+ Linear (NPS+)

How does sentiment relate to touchpoint satisfaction?

Wayfinding, Check-in and Transfers between terminals have the strongest relationship with positive sentiment – meaning improvements in these areas are most likely to lift overall satisfaction. These touchpoints help shape the start and flow of the journey, making them critical to first impressions and ease of travel.

Strength of Relationship Between Touchpoints and Sentiment (%age relationship between the touchpoint scores and NPS+)



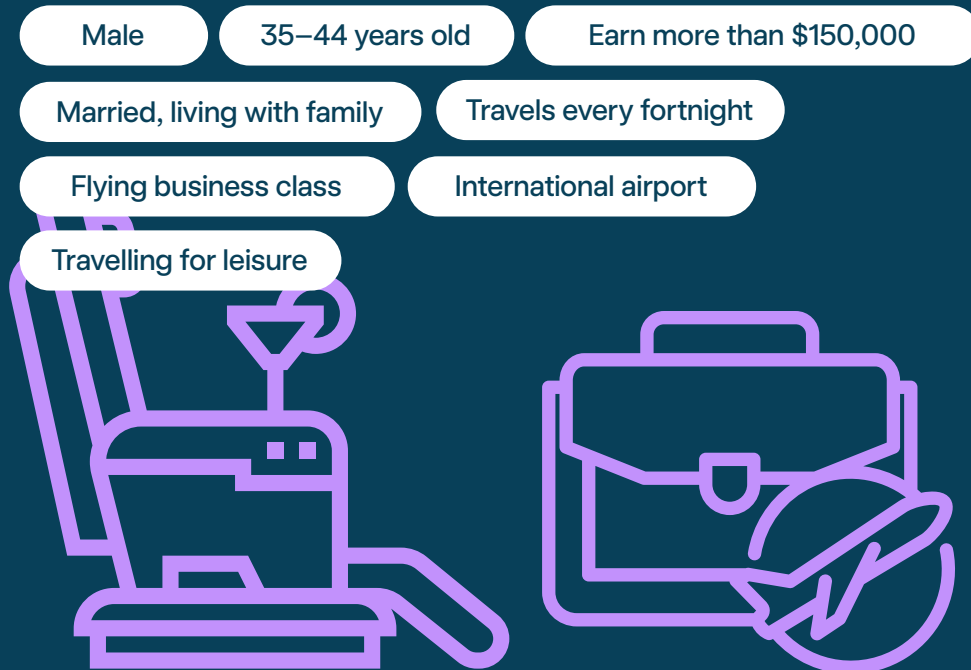
The importance of great wayfinding

Our research suggests that if your travellers are happy with the wayfinding and directions it is highly likely they will have a positive sentiment towards the overall airport.



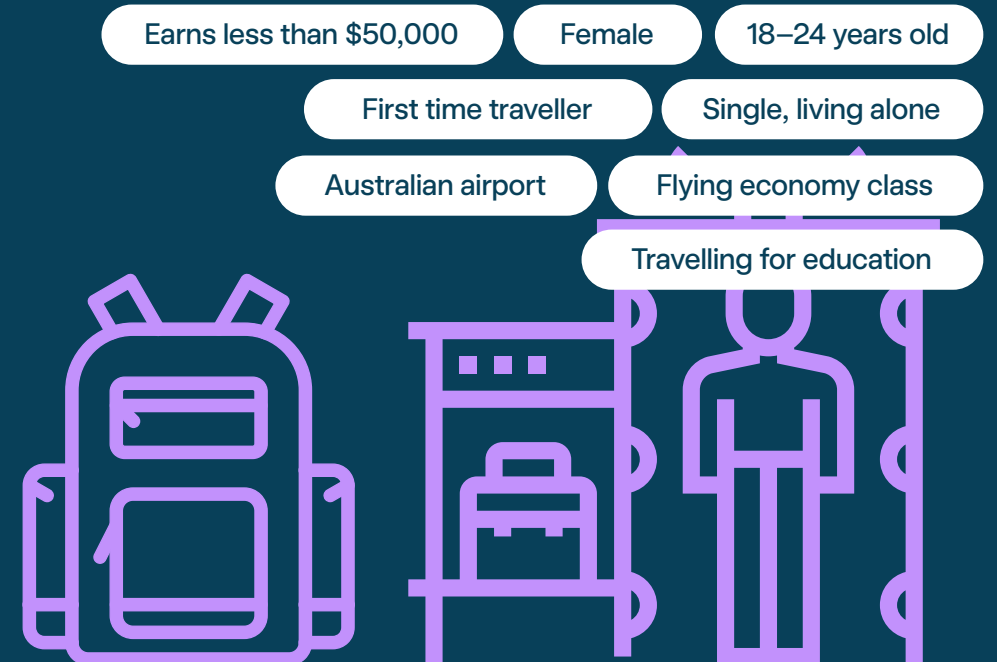
Who is most likely to be the most satisfied traveller?

Travellers most likely to report high satisfaction tend to be males aged 35–44, travelling for leisure in business class, with incomes over \$150,000. They are often part of a household with family or friends, depart from international or small airports, and travel frequently – every two to three weeks.



Who is most likely to be the least satisfied traveller?

Those least likely to report high satisfaction are typically females aged 18–24, travelling alone in economy class, with incomes under \$50,000. They are more likely to be travelling for education or study, flying from a medium-sized airport, often on their first trip.



To unlock spend, main opportunity lies in understanding how we can better fulfill travellers across airport types.



Only 12% of travellers at large Australian capital city airports are completely fulfilled (scoring 10/10). For small regional airports, the number is only marginally higher at 15%.

This leaves a significant opportunity: more than 85% of travellers are not fully fulfilled.



The most satisfied travellers are also the most regular visitors – the data indicates that the most satisfied travellers are those who travel fortnightly, while the least satisfied are those travelling for the ‘first time’.

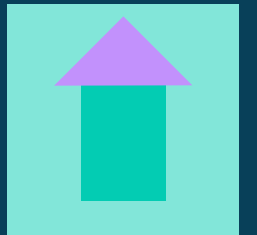
Airports that ascertain exactly what satisfies their travellers and invest accordingly are able to unlock increased loyalty and spend.

02

What is the spend profile?



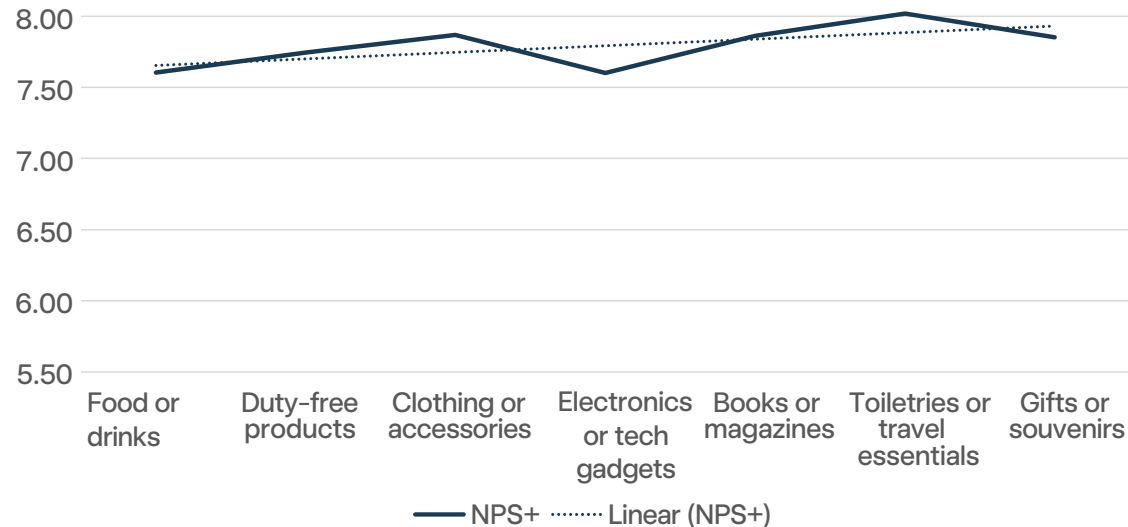
Importantly, we asked about the total spend from the travellers' home to boarding. This provides more context about why some travellers might be reluctant to spend more when they arrive at their departure airport.



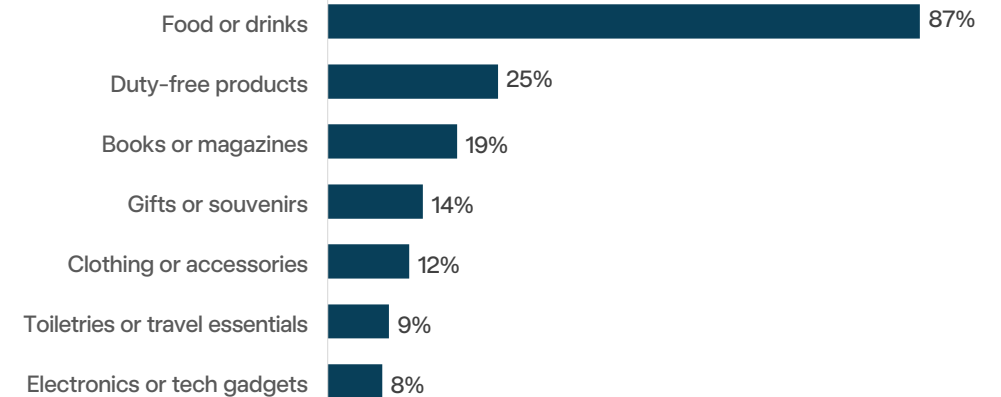
How does sentiment relate to type of spend?

The evidence suggests that there is only slight variation of sentiment by spend category. Certainly not correlated strongly enough to suggest that the purchase category itself support a more positive sentiment.

NPS+ by Category Spend In-Airport



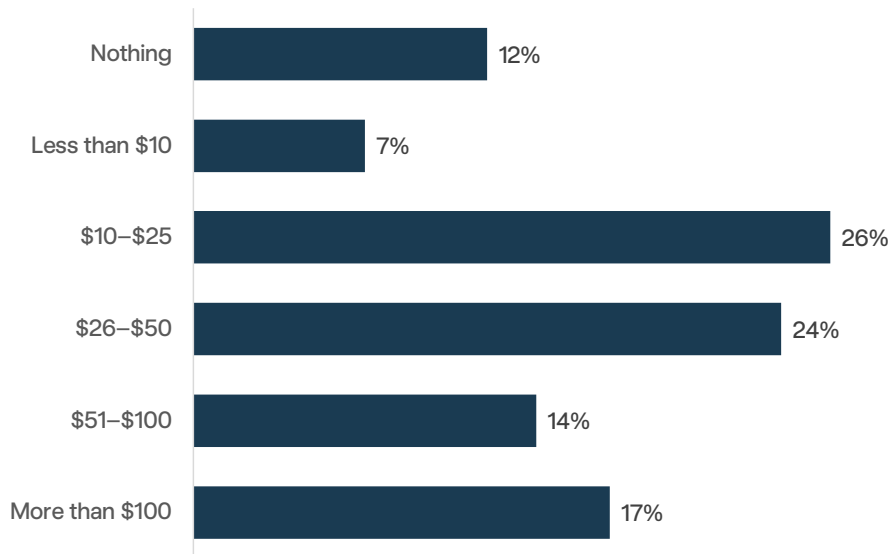
Perceived In-Airport Spend by Category



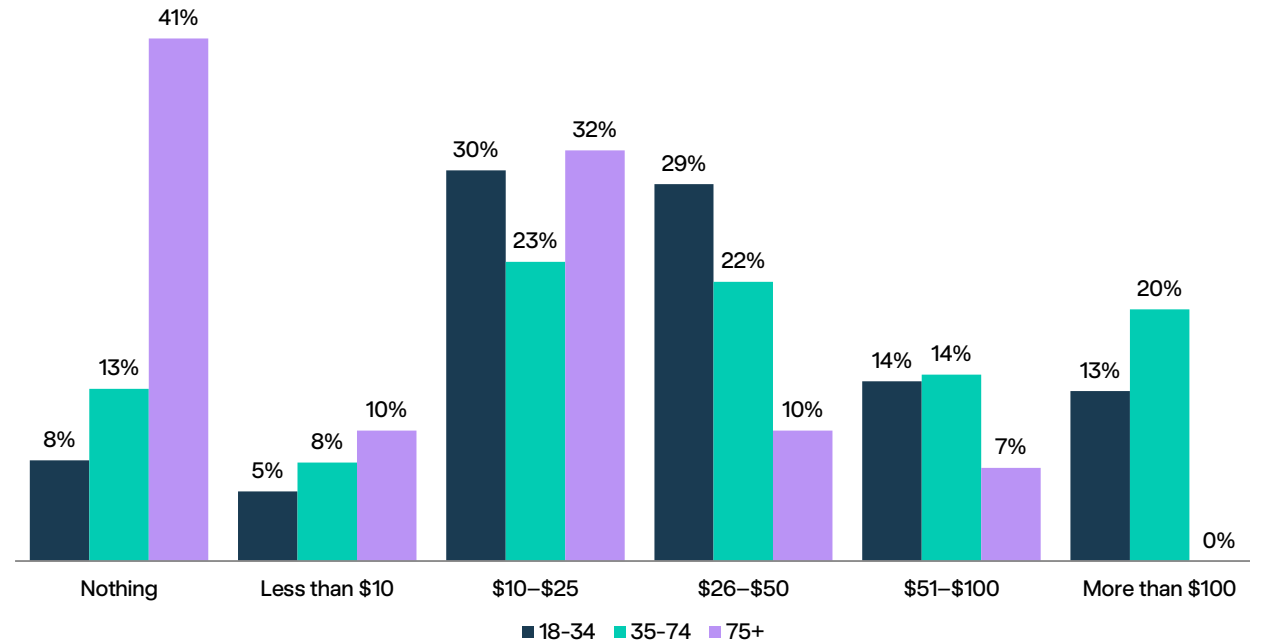
How does spend relate to age?

When including all transit and parking expenditure only 12% of travellers perceive that they spend nothing between their homes and boarding. Interestingly, those over 75+ are easily the most likely age group to spend 'nothing'.

Perceived Spend for Travelling Group
(Including transfer to airport and parking)



Perceived Spend for Travelling Group by Age
(Including transfer to airport and parking)

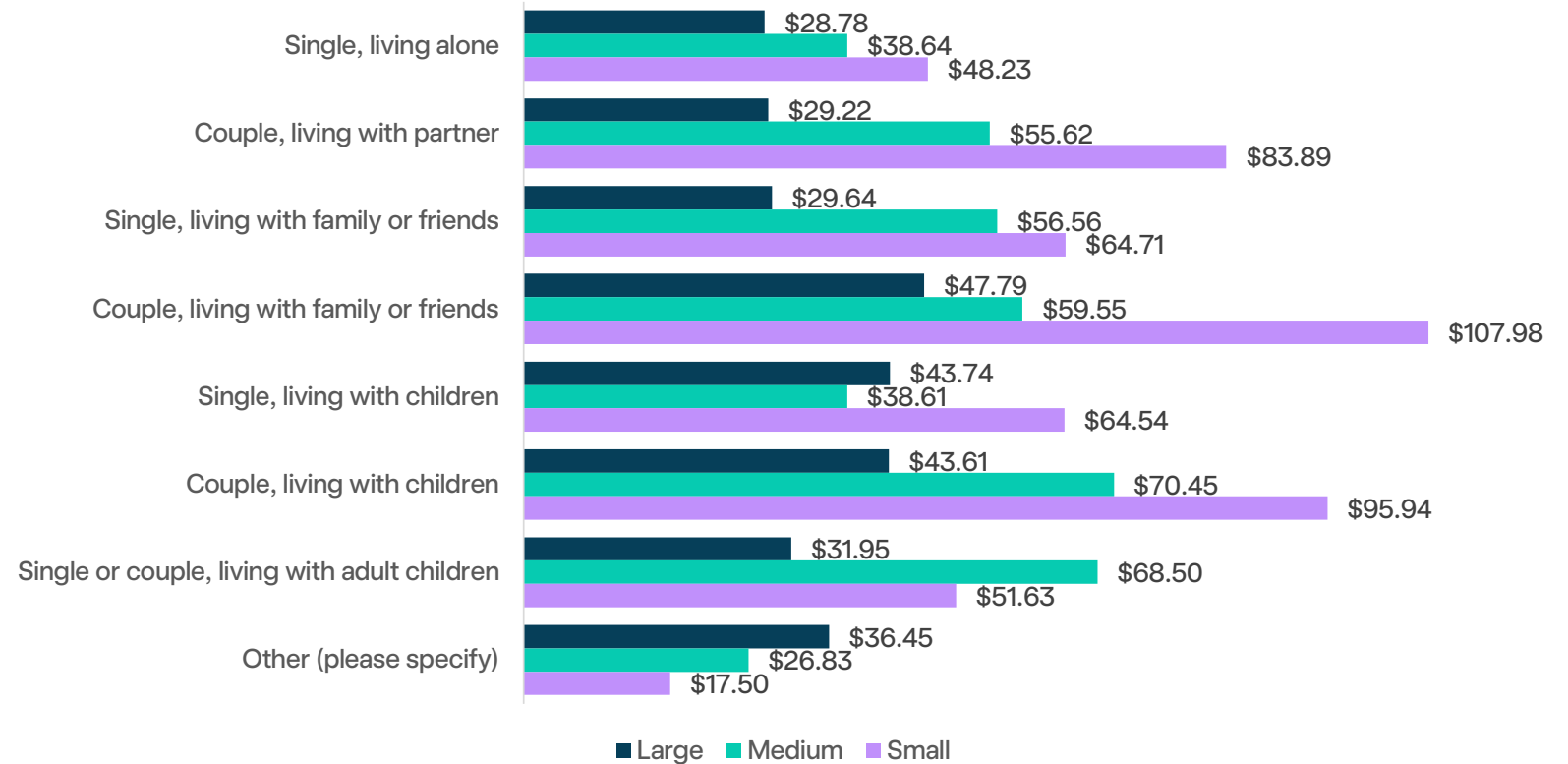


How does spend relate to living situation?

Similar to sentiment, passengers with children spend around 50% more than those without.

Including the transit costs, travellers using Small airports spend between 30-50% more than Large airports.

Perceived Spend for Travelling Group by Airport Size (Including transfer to airport and parking)



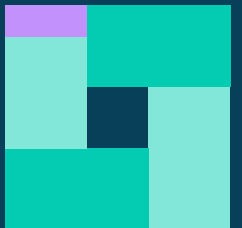
Note: Small Samples in some groups

03

How does sentiment relate to spend?



The evidence is clear: more satisfied travellers spend more. The most satisfied travellers are the biggest spenders – and spend data indicates an increase of \$29.41 per trip for every 1% increase in satisfaction.



How does sentiment relate to spend?

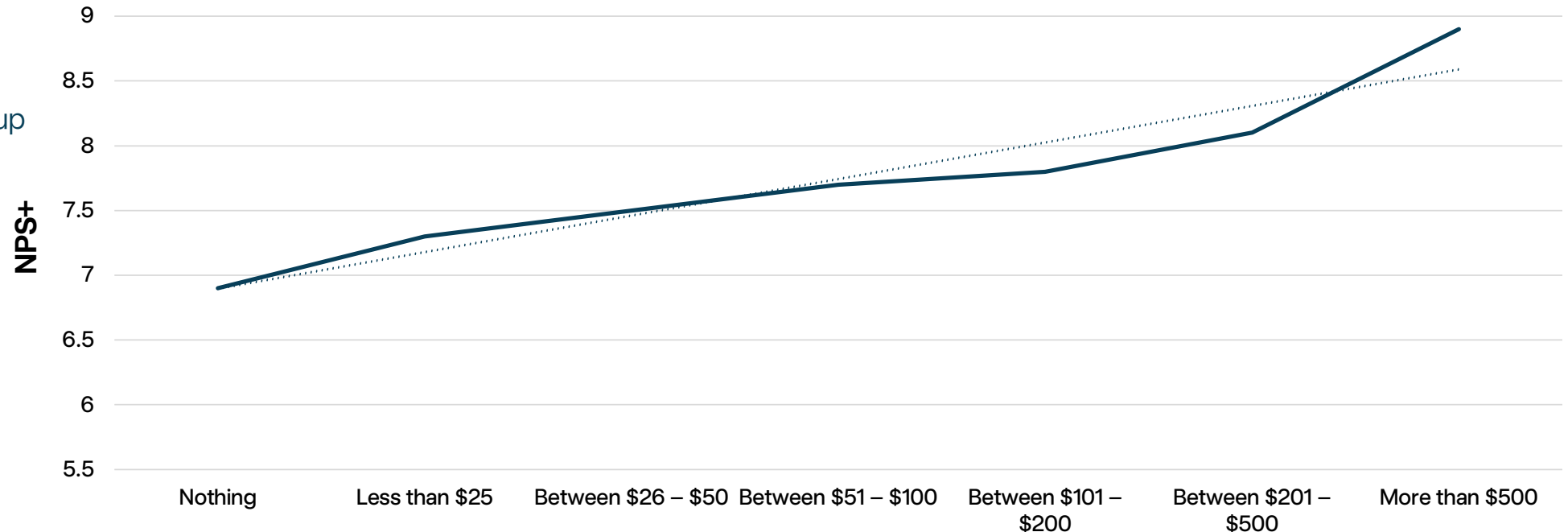
The data indicates that traveller satisfaction and spend are strongly correlated.

As satisfaction (NPS+) increases, so does spend – sharply. Travellers who report higher satisfaction levels are significantly more likely to spend more within the terminal. The relationship is clear: for every 1% increase in NPS+, average spend rises by \$29.41 per trip.

This highlights the commercial value of investing in experience – improving sentiment not only enhances traveller perception but directly supports greater spend per visit.

Mean NPS+

For each spending group – out of 10.



Regardless of airport type, a clear relationship between sentiment and spend exists.

8.5

8.0

7.5

7.0

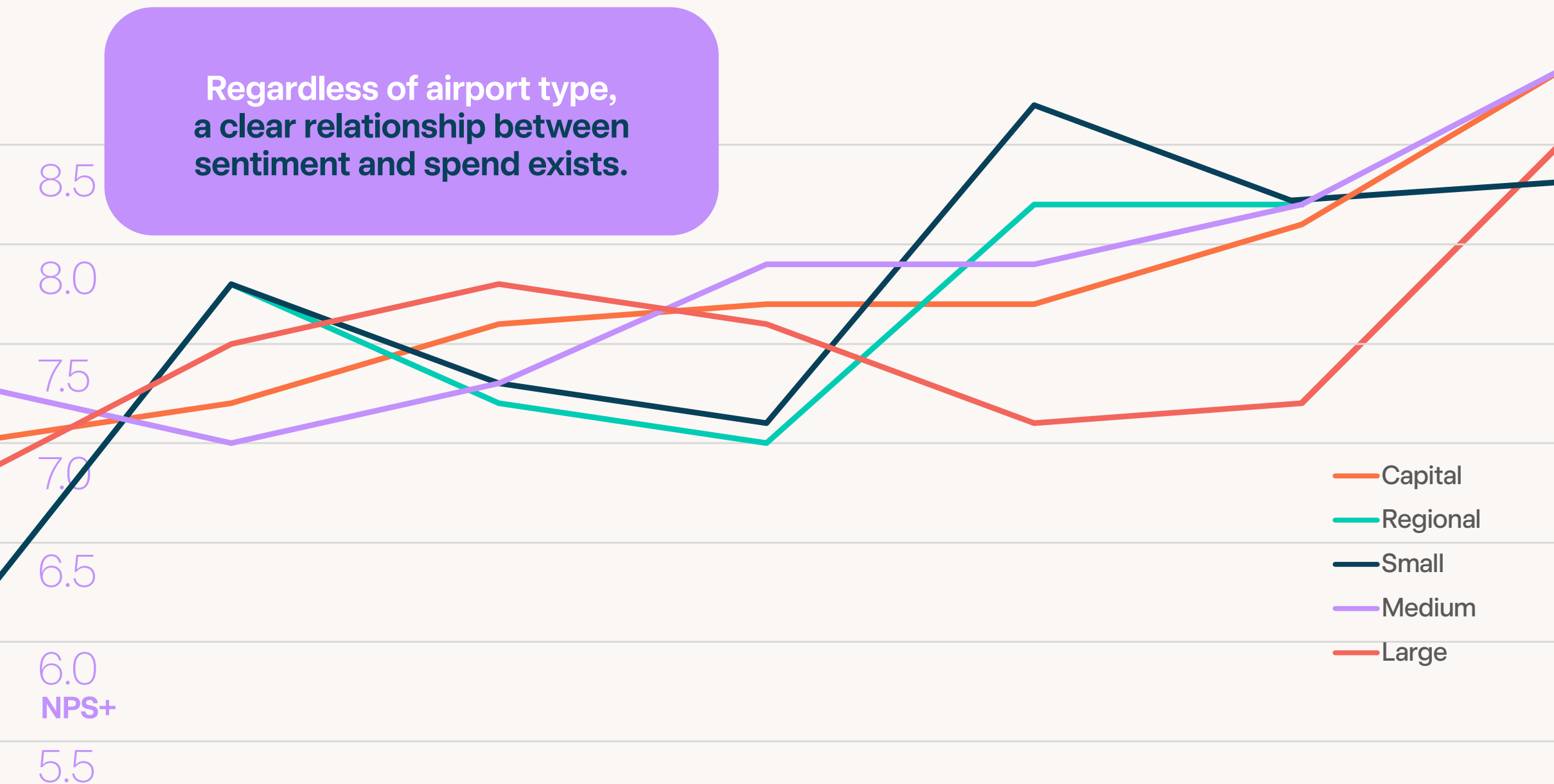
6.5

6.0

5.5

NPS+

- Capital
- Regional
- Small
- Medium
- Large



How does sentiment relate to spend?

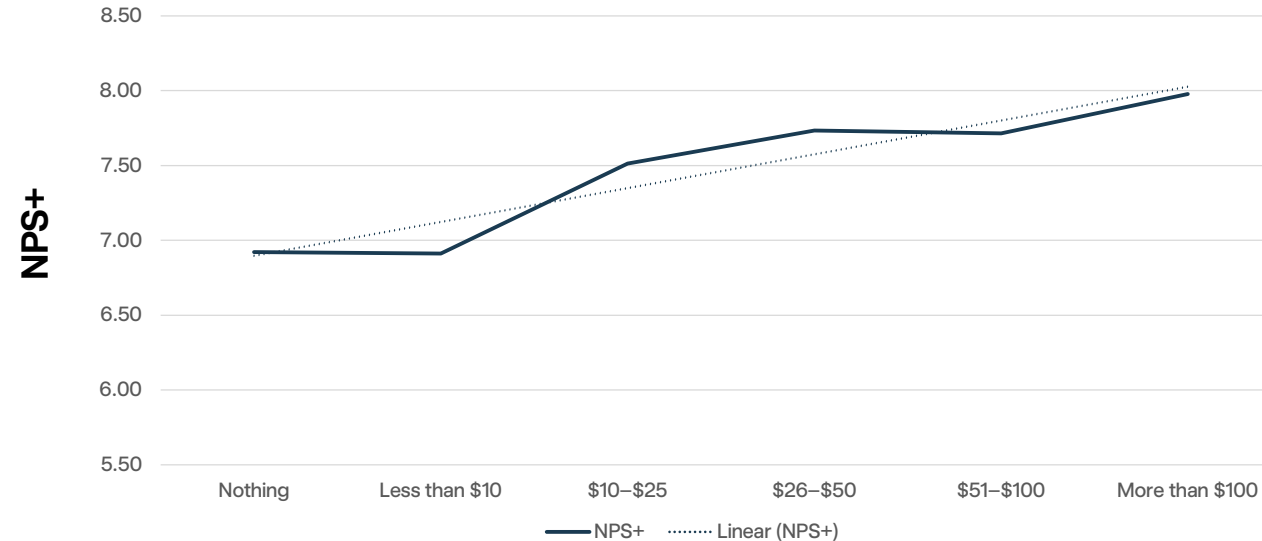
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Mean NPS+

For each spending group – out of 10.
(Large)



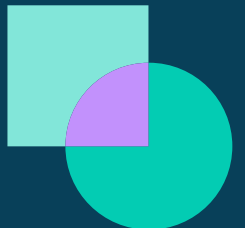
04

How do we encourage increased spend?



Sentiment relates to spend – but how do we increase spend through sentiment?

There are five key insights from the data which could be a starting point.



Before we get started –
Remember, your role starts before passengers leave their house.

Someone who plans to spend on their journey will – on average – outlay \$10 more than someone who does not.

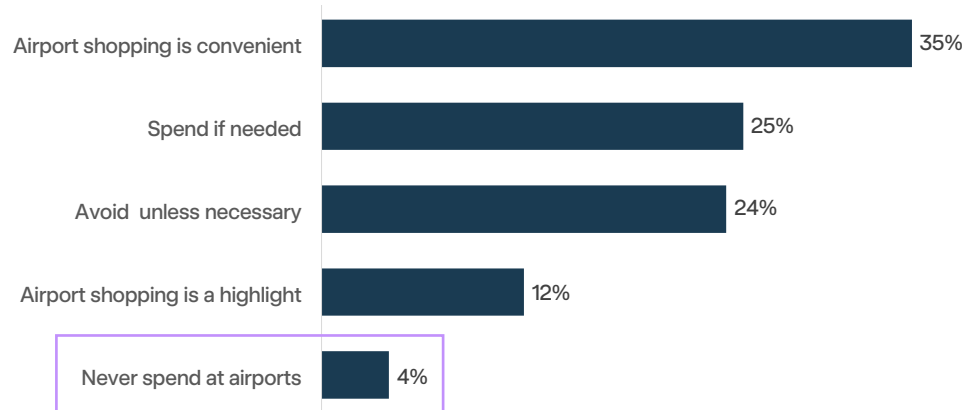


Recommendation 1: Focus your Efforts

Reluctant spenders are tiny contributors – focus your efforts on those with most to gain.

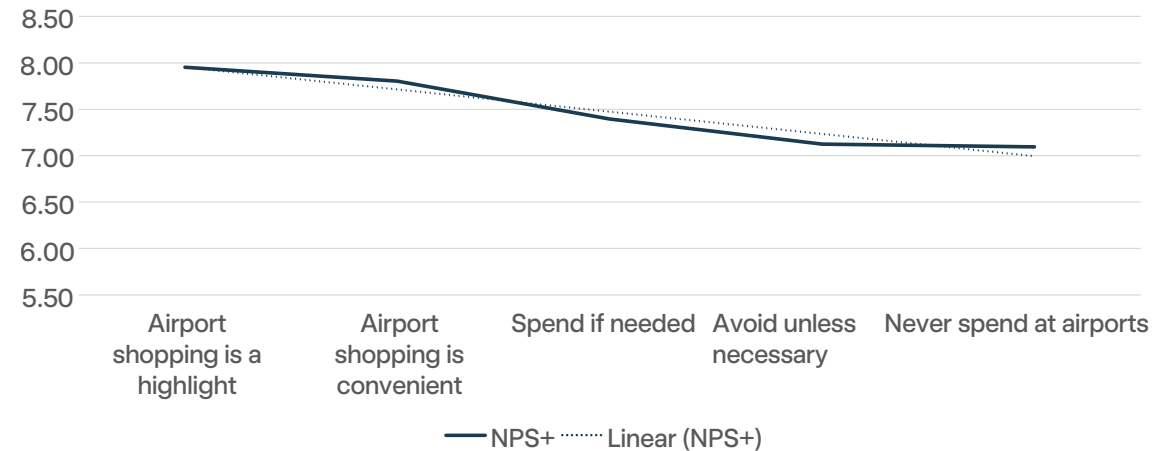
For every dollar that those who ‘never spend at airports’ actually spend—those that think that airport shopping ‘convenient’ spend \$67.

Perception of Spending at Airports %age



Mean NPS+

For each spending group – out of 10.



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Average Spend by Perception

\$AUD per travelling group (includes transit and transport costs)



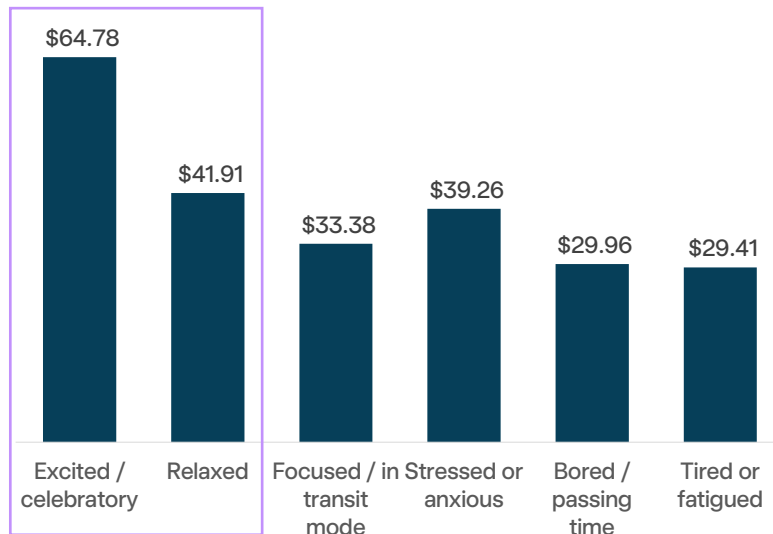
Recommendation 2: Reduce the Stress

Being 'relaxed' elevates spend. Ideally, give travellers a reason to be 'excited'.

As a bonus, relaxed and excited travellers are more positive about their airport experience.

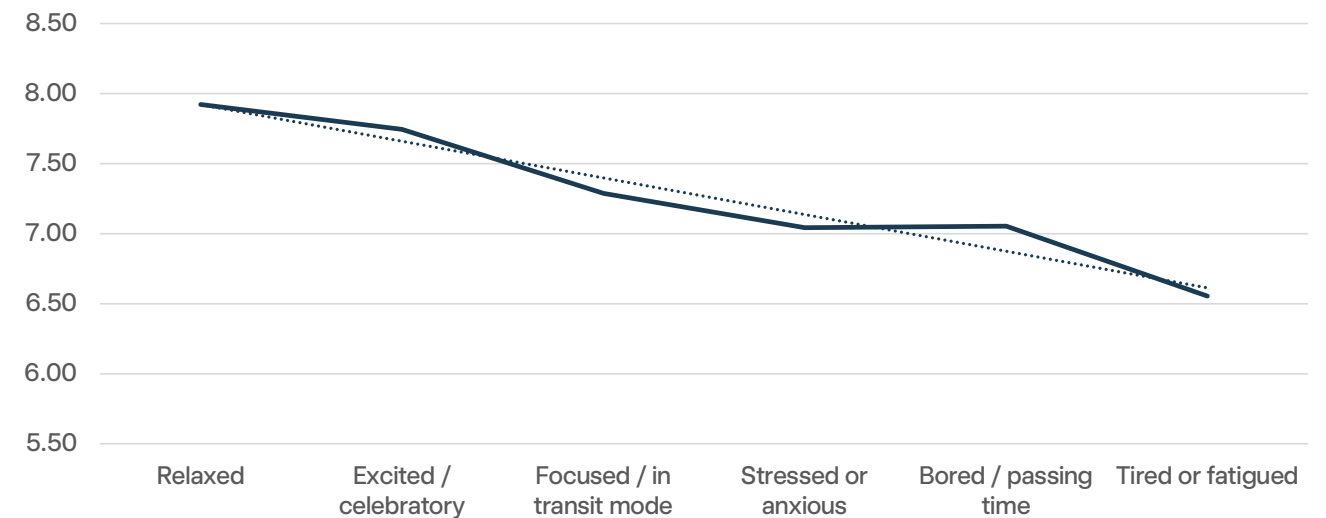
Average Spend by Mood

\$AUD per travelling group (includes transit and transport costs)



NPS+ by Mood

For each mood type – out of 10.

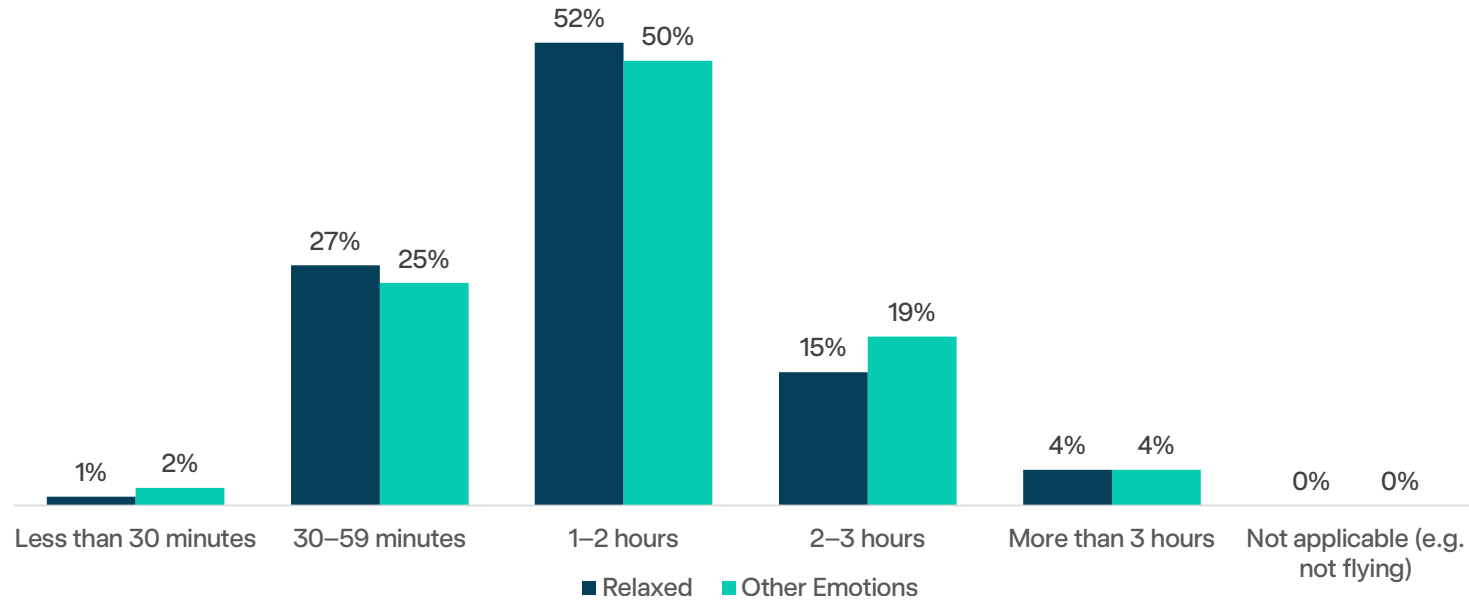


Recommendation 2: Reduce the Stress

Being relaxed is a mindset – not only being organised and on-time.

The evidence indicates that travellers who are relaxed generally arrive with slightly less time before boarding, compared to the other moods.

Arriving Time Before Boarding Relaxed vs Other Emotions



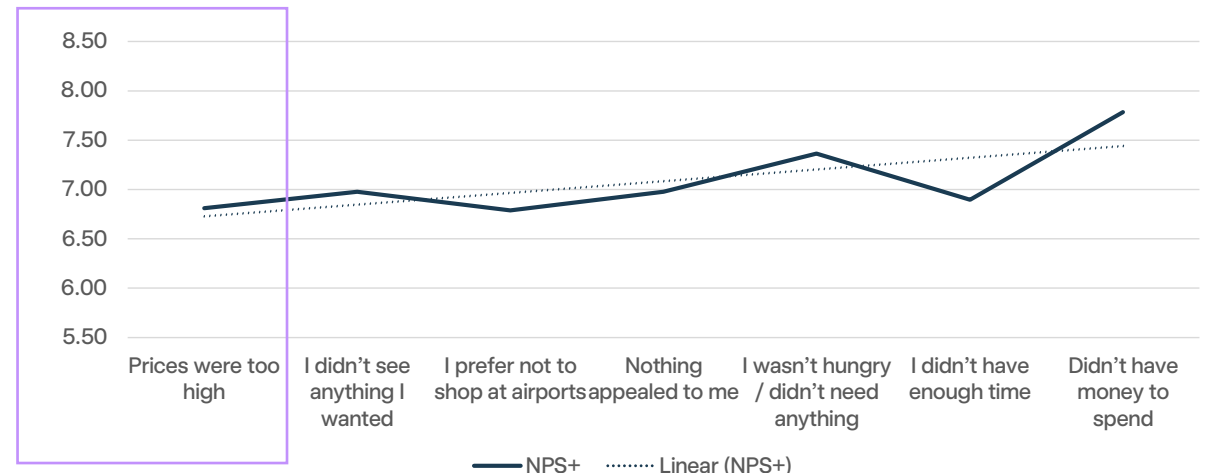
Recommendation 3: It's All About Pricing

The view that 'lower prices' would encourage travellers to spend more is held by two-thirds of all travellers – regardless of how much they spend or whether they like airport shopping.

Spend More %age multi-select



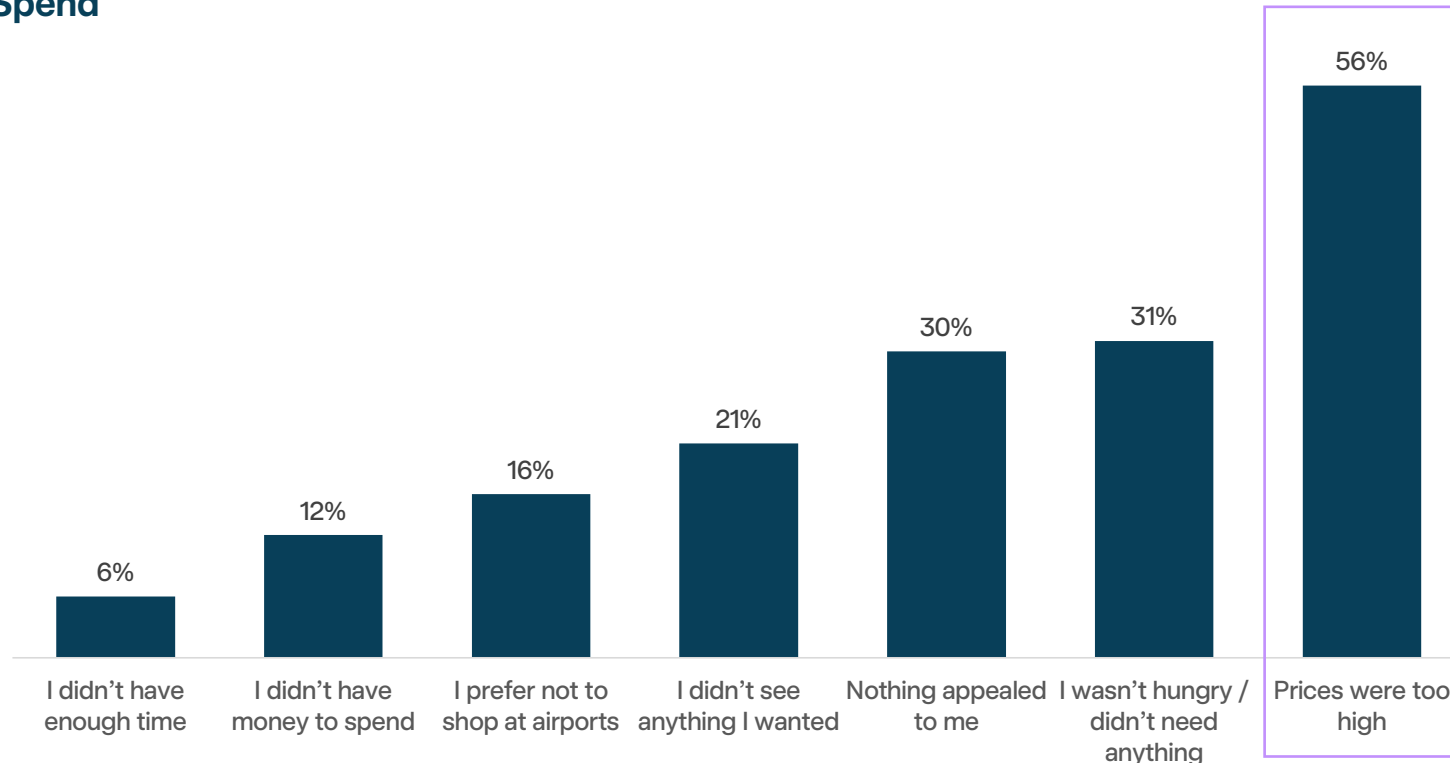
NPS+ by Spend more For each selection – out of 10.



Recommendation 3: It's All About Pricing

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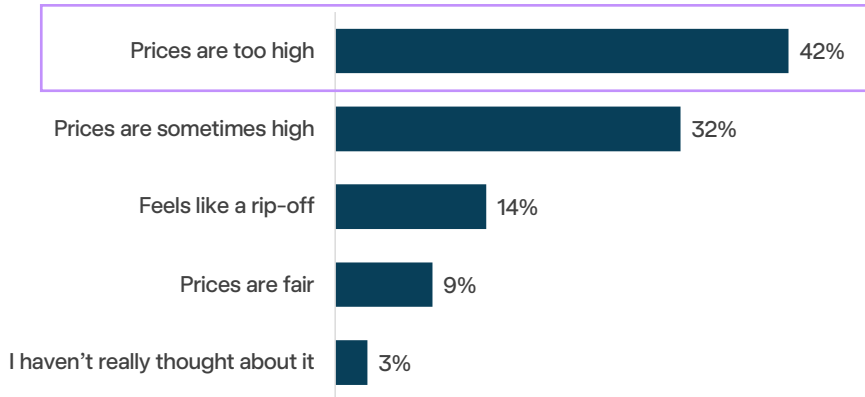
Non-Spenders to Spend %age multi-select



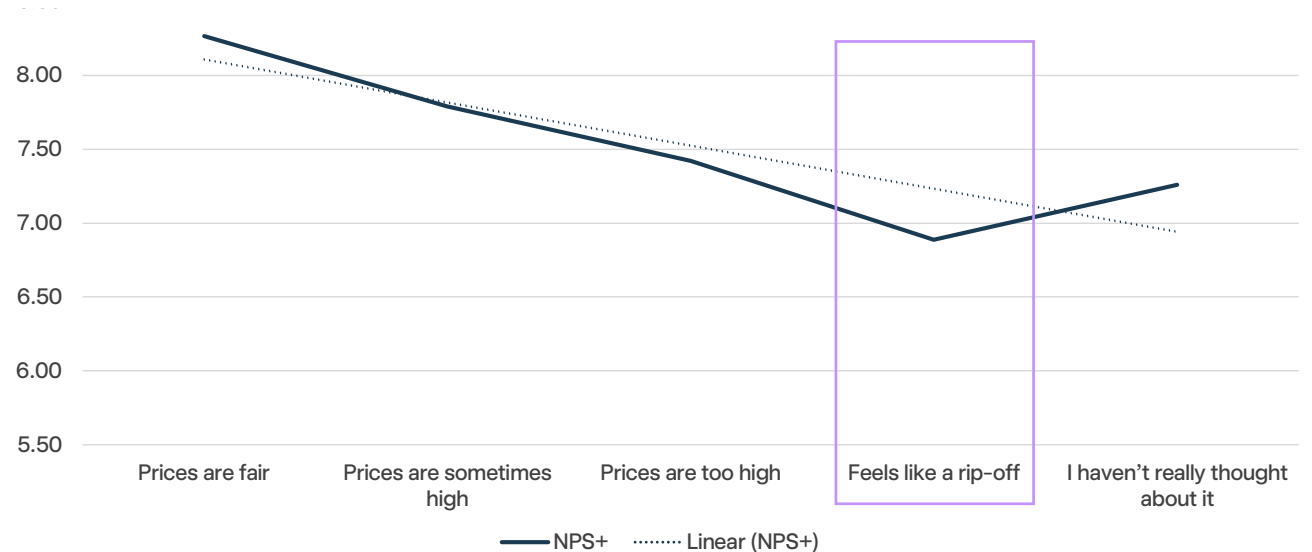
Recommendation 3: It's All About Pricing

The Van Westendorp Price Sensitivity Meter (PSM) is a survey-based pricing research method that helps determine consumer perceptions of price-value and identify an acceptable price range for a product or service.

Pricing Perception %age single-select



NPS+ by Pricing Perception For each selection – out of 10.



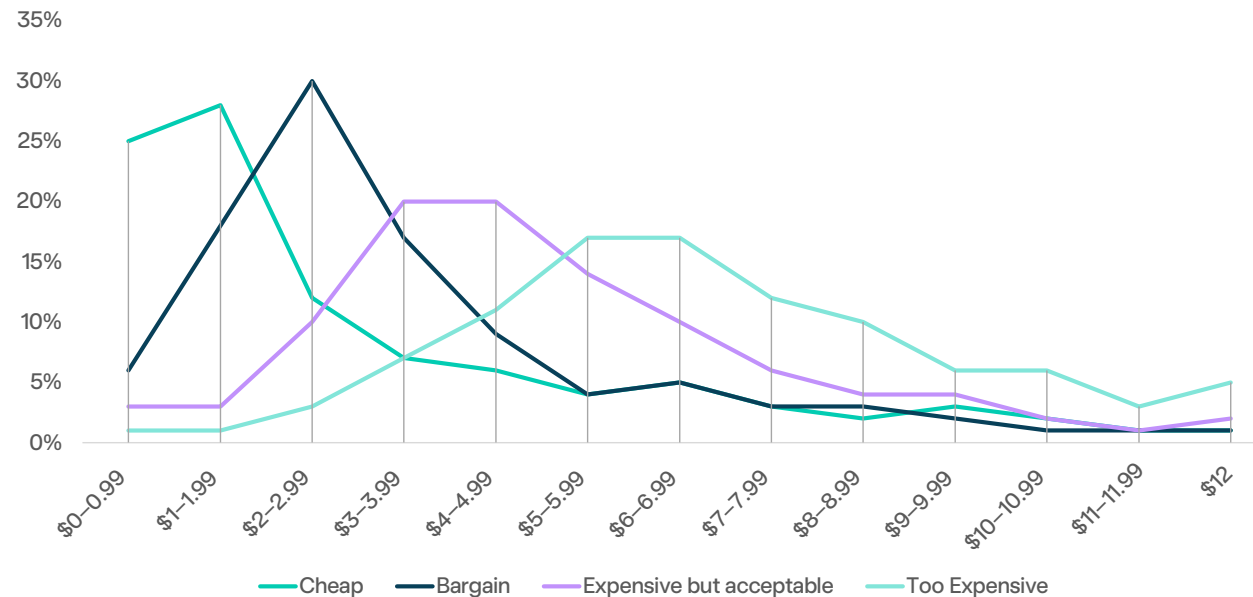
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Non-Spenders to Spend
%age multi-select



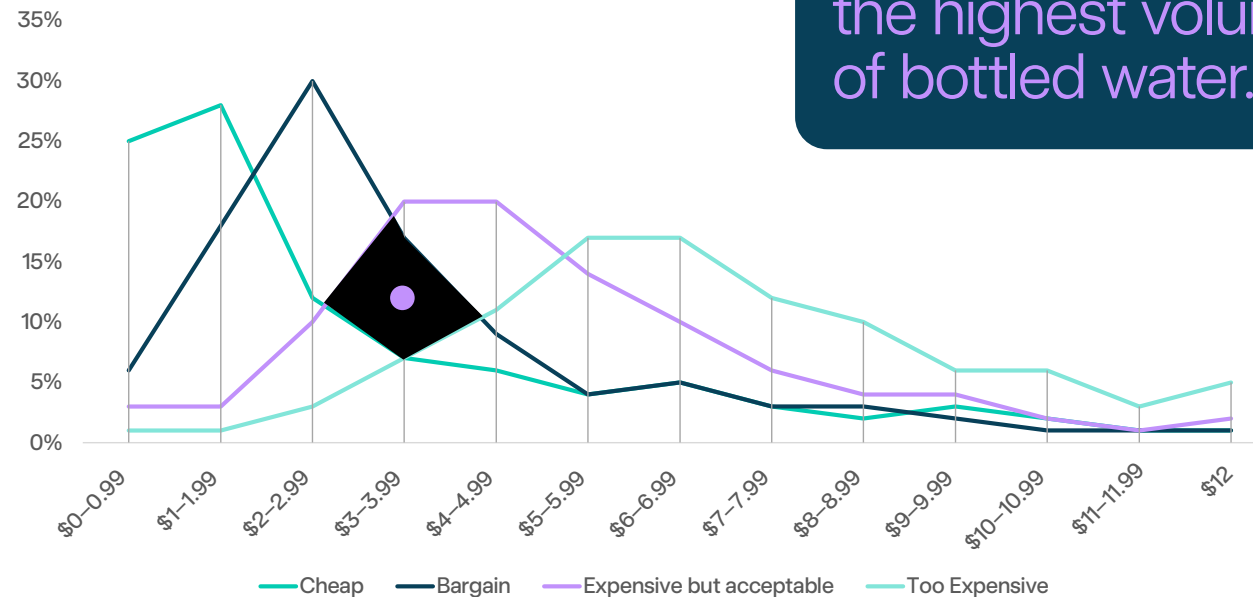
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Non-Spenders to Spend
%age multi-select



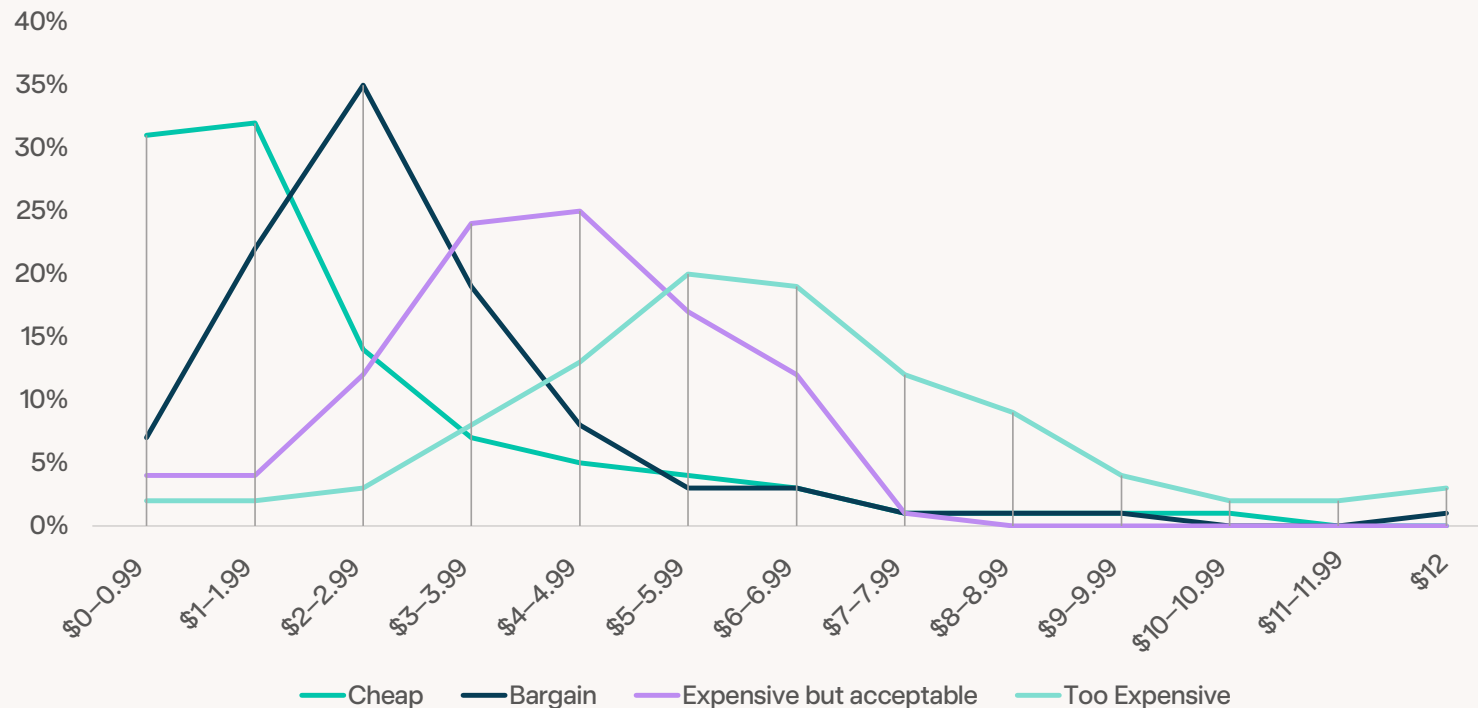
\$3.98 would sell
the highest volume
of bottled water.

Recommendation 3: It's All About Pricing

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Large Airports

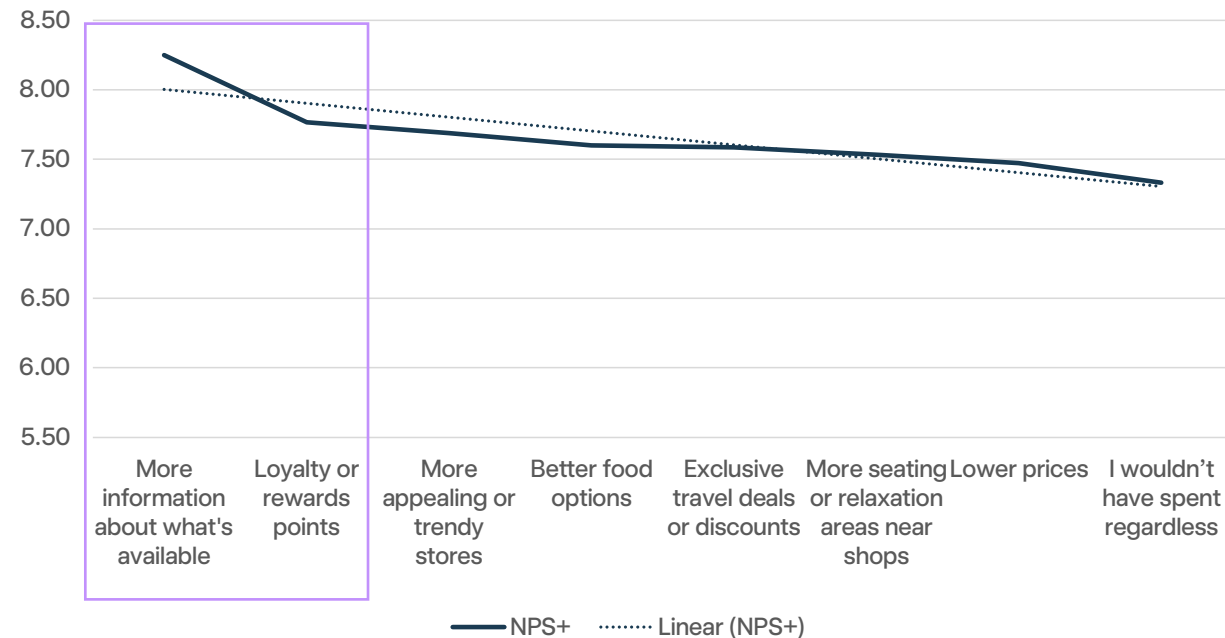


Recommendation 4: Information, Rewards and Discounts

For low-spenders in particular, it appears that they are more interested in 'more information', 'rewards' and 'discounts'.

NPS+ by Suggested Changes (Low Spenders Only)

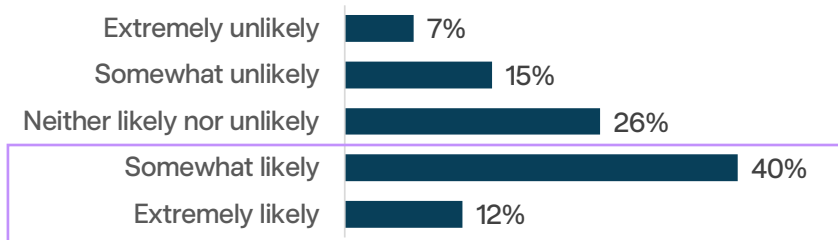
For each spending group – out of 10.



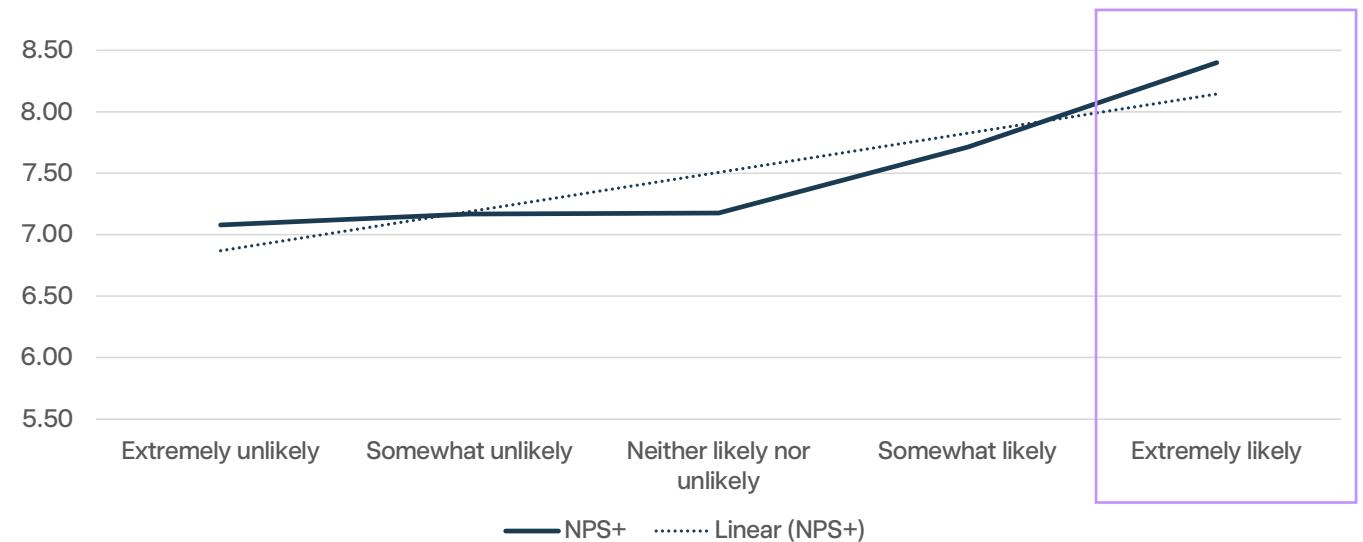
Recommendation 5: Invest in the Next Visit

Travellers who have positive experiences are more likely to plan on spending more next time. Therefore, it would be wise to think about keeping travellers satisfied over the long-term.

Spend – Future Likelihood
%age single-select



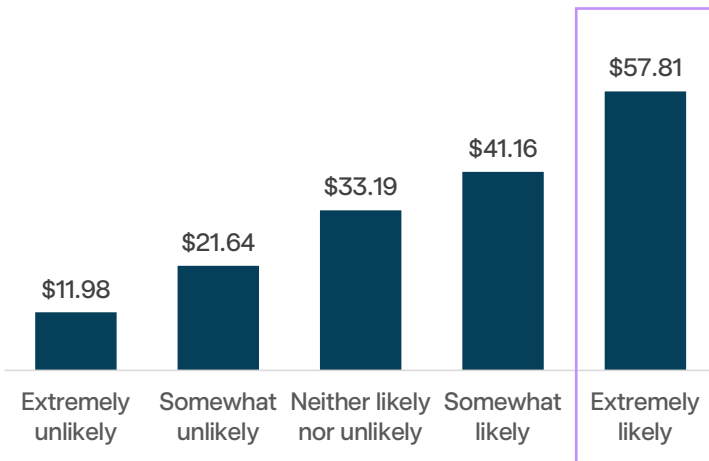
NPS+ by Future Likelihood
For each spending group – out of 10.



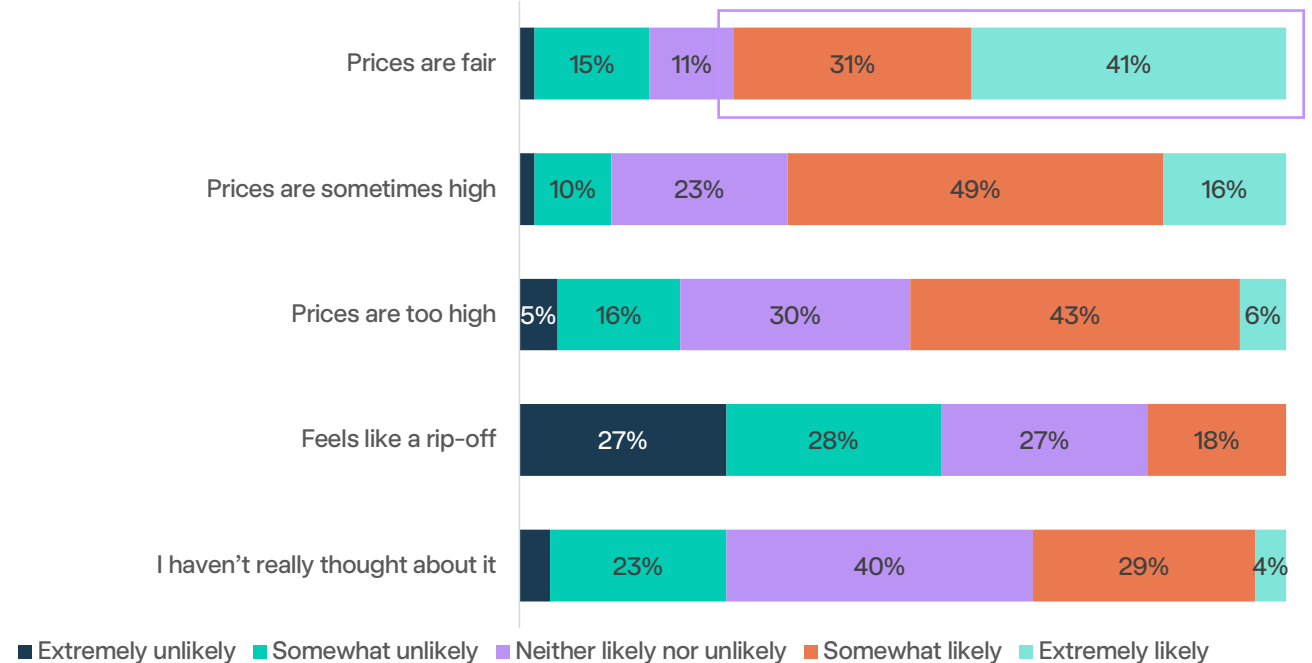
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Spend – Future Likelihood
%age single-select



Spend – Future Likelihood
%age single-select



Summary:

Sentiment Conclusions

Main Insights related to Sentiment

- 1. Traveller satisfaction and spend are strongly correlated**, with a \$29.41 average increase in spend per trip for every 1% increase in satisfaction (NPS+).
- 2. Small airports outperform on sentiment**, achieving the highest scores for satisfaction, advocacy and loyalty, driven by simplicity and a more relaxed environment.
- 3. Wayfinding, check-in and terminal transfers are critical touchpoints**, with improvements in these areas having the strongest positive relationship to overall sentiment.
- 4. Business travellers and older travellers** report the highest satisfaction, while younger, first-time, and lower-income travellers tend to be **least satisfied**.
- 5. Travellers living with a partner and/or children** report significantly **higher sentiment and spend** approximately 50% more than those travelling alone.

Summary:

Spend Conclusions

Main Insights related to Spend

- 1. Perceptions of airport pricing are a major barrier to spend**, with two-thirds of travellers stating that lower prices would encourage them to spend more.
- 2. Relaxed and excited travellers spend more**, suggesting mood management strategies can lift both sentiment and commercial outcomes.
- 3. Pre-trip spend intention is a key predictor of actual spend**, with planned spenders averaging \$10 more per journey than those who did not plan to spend.
- 4. Travellers who perceive airport shopping as ‘convenient’ spend significantly more** – up to 10 times more than those who say they ‘never spend at airports’, suggesting that shopper mindset is a key determinant of spend.
- 5. More satisfied travellers not only spend more on their current journey but are also more likely to intend spending more in future**, reinforcing the long-term commercial benefit of investing in traveller experience.

Large Airports

Large airports benefit from scale, but size brings complexity – and many fall short of growing expectations.

Highest performing factors supporting satisfaction

- High awareness of brand presence, choice and facilities
- Technology, entertainment and digital tools often rated above benchmark
- Strong results for arrivals experience, including passport control and rideshare access
- Frequent and premium travellers rate these airports higher across nearly all metrics

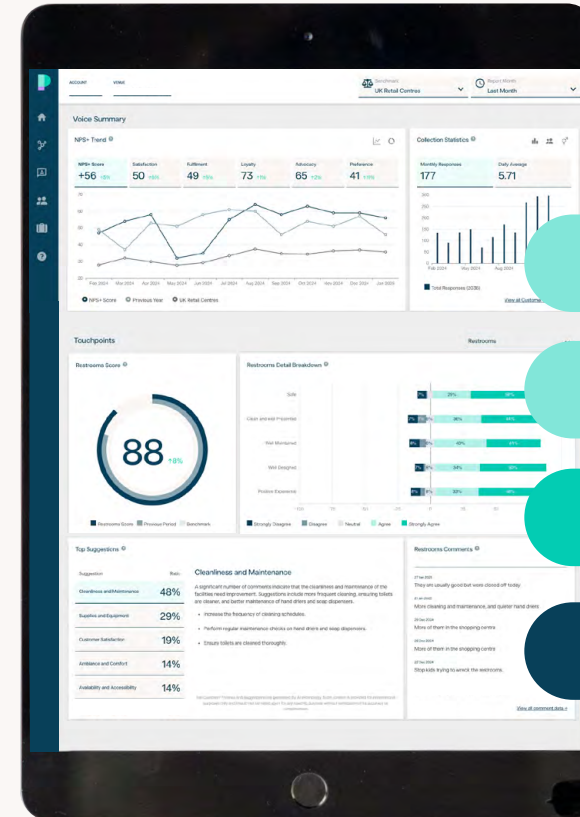
Opportunities for improvement

- Wayfinding and transfers across terminals are commonly cited as difficult or unclear
- Touchpoint cleanliness and maintenance suffer under heavy foot traffic
- Travellers express frustration with crowded seating zones and unclear gate information
- Retail pricing, food choice and layout often disappoint relative to expectations
- Many large airports underperform on advocacy and fulfilment, despite strong infrastructure

Prescient Research turns traveller sentiment into strategic action.

Prescient Voice is more than a sentiment tool – it's a system for real-time feedback, continuous improvement, and measurable impact.

We make the link between satisfaction and return on investment clear, measurable, and actionable.



Measure satisfaction

Make changes

Improve satisfaction

Financial returns

05

Want to know more about your airport?

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