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**Agenda Item 40: Economics of Airports and Air Navigation Services — Policy**

**QUALITY OF SERVICES AND FACILITIES IN BRAZILIAN AIRPORTS: GOVERNMENTAL MONITORING**

(Presented by Brazil)

**EXECUTIVE SUMMARY**

This paper aims to share with other members of ICAO, Brazilian experience in governmental monitoring of services and facilities at airports, upon the presentation of the Permanent Passenger Satisfaction Survey and Airport Performance, conducted by the Secretariat for Civil Aviation of the Ministry of Transport, Ports and Civil Aviation of Brazil in 15 main Brazilian airports, which account up to 80% of regular movement of aviation passengers in the country. This presentation expects to demonstrate the importance of governmental monitoring on public services to other countries. The monitoring of performance through surveys and performance indicators contributes to decision making and to define public policies in civil aviation sector within the airports. This includes strategic actions and investments in infrastructure, which directed to the priorities set for each airport and based on the results of each item evaluated, may result in maximizing resources, efficiency, and increased passenger satisfaction.

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| <i>Strategic Objectives:</i>   | This working paper relates to Strategic Objective D — <i>Economic Development of Air Transport</i> . |
| <i>Financial implications:</i> | Not applicable.  |
| <i>References:</i>             | Annex 9 — <i>Facilitation</i> (14th edition, October 2015)   |

<sup>1</sup> Spanish version provided by Brazil.

## 1. INTRODUCTION

1.1 Given the increased growth of civil aviation in Brazil since 2003, the Brazilian government undertook a comprehensive institutional reform in the sector, with the creation of the National Civil Aviation Agency (ANAC), in 2005; the development of the National Civil Aviation Policy in 2009; and the establishment of the Secretariat for Civil Aviation in March 2011. At that time linked to the Presidency of the Republic with ministerial status and today composing the structure of the Ministry of Transport, Ports and Civil Aviation, the main task is to formulate, coordinate and oversee policies for the development of the civil aviation sector and the airports infrastructure.

1.2 The creation of the National Commission of Airport Authorities (CONAERO), also in 2011, responsible for the organization and coordination of public activities at airports was another governmental action to achieve these objectives. With the participation of all government agencies that have linked activities directly to airport operations, the Commission aims, above all, to promote the coordination of the exercise of powers of bodies and agencies at airports.

1.3 In addition to these actions, the air demand growth and the physical and structural lag of Brazilian airports led the government to support efforts to modernize airport infrastructure by a program of concessions. This transferred to private management a set of six airports among the country's main ones, in order to: (i) stimulate competition; (ii) improve service levels standards; (iii) allow the sustainability of the operation; and (iv) transfer technologies and experience in airport management to Brazil. In this context, investments were made in the order of US\$ 2.1 billion since 2012, which provided the growth of 125% in passenger terminals and 87% of capacity at these airports.

1.4 Besides this strong growth, hosting large mass events in 2013 (World Youth Day and Confederations Cup), 2014 (FIFA World Cup) and 2016 (Olympic and Paralympic Games), represented a major challenge to Brazilian aviation sector and installed airport infrastructure. This lead CONAERO to establish as one of the major actions, monitoring service quality of the major airports in the country, in order to obtain a beacon of planning and overseeing actions aimed at the improvement of the passenger delivered service in the airports.

1.5 Based on this determination in 2011, discussions were engaged with the public agencies involved in the process, and the participation of private entities of the sector in a specifically forum created under CONAERO to discuss the subject, called Technical Committee of Operational Performance (CTDO).

## 2. PERMANENT PASSENGER SATISFACTION SURVEY AND AIRPORT PERFORMANCE

2.1 After a period of testing and methodology assessments, in 2013 the Permanent Passenger Satisfaction Survey and Airport Performance was established. In order to evaluate the passenger experience in 15 airports of Brazil, in different infrastructure items, such as, customer care and airport facilities, and assess the performance of airport processes such as check-in, security check, baggage claim. Representing an important reference for the administrations of the evaluated airports and encouraging competition between these units, the survey also, seek to guide the establishment of new procedures that can improve the quality of service to passengers at these airports.

2.2 The 15 airports currently researched represent 80% of the country regular aviation traffic and chosen because of its use during the 2014 FIFA World Cup. Starting in January 2017, the research

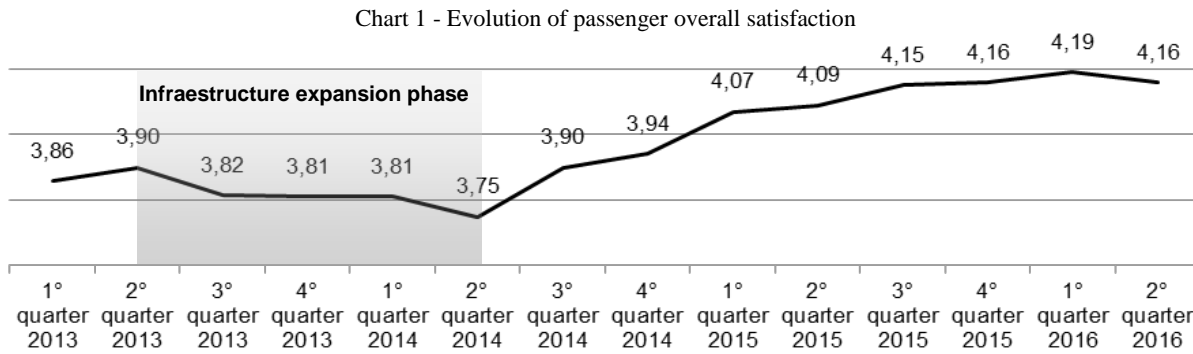
will include more airports and reach the airports which movement exceeds three million passengers by year and those granted to private administration, expanding the survey to 19 airports and 85% of the country regular aviation traffic.

2.3 Since its implementation, the Permanent Passenger Satisfaction Survey and Airport Performance has been continually evaluated and enhanced by the Secretariat in regular CTDO meetings, with the participation of public agencies, private sector entities and airport operators. Currently, the research is composed of 37 passenger satisfaction indicators and 33 airport processes indicators.

### 3. RESULTS

3.1 After three years of nonstop survey, during which Brazil implemented the concessions program in six of the major airports in the country there was a critical phase right after the concessions because most of the airports went through expansion works of their infrastructure. Adding to this, huge mass events that put to test the ability of planning and management of large publics for the air mode transport. After all, the survey shows a significant increased passenger satisfaction with the services provided in the monitored airports.

3.2 In the chart below, it is possible to see the evolution of the overall passenger satisfaction on a scale ranging from 1 to 5, where 1 = very poor, 2 = poor, 3 = regular, 4 = good, 5 = very good.



3.3 The Survey also shows that the frequency of Overall Satisfaction grades between 4 to 5 is around 86%. In other words, 86% of the passengers evaluated the airports as good or very good in the second quarter of 2016. During the Rio 2016 Olympic Games this ratio reached impressive 90% of positive reviews.

3.4 Beyond the pursue for increased passenger satisfaction and improvement of airport processes times, the survey also allowed the Brazilian Government to define, through CONAERO, policies related to the performance of public agencies at airports, such as, establishment of maximum queue waiting time for migration control and customs.

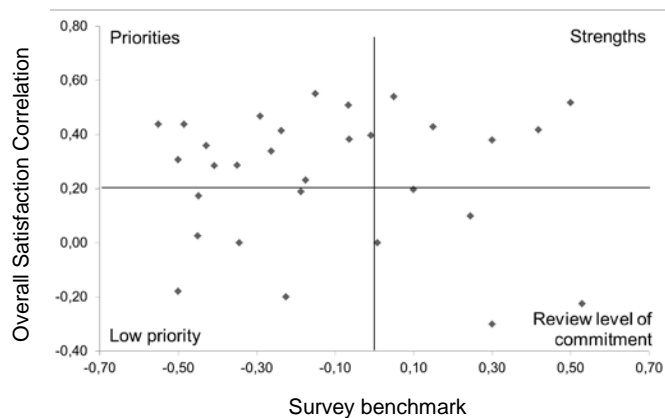
3.5 With the data collected by the Secretariat and published quarterly on its website through the Airports Operational Performance Report, it is possible to track the performance of each process

monitored and the passenger satisfaction at the airports included on the survey. Public agencies operating in these airports monitor these results, providing basis verification of goal achievement set by CONAERO, which corresponds to 16 minutes of average waiting time in queue for migration control and 8 minutes of average waiting time in queue for customs control.

3.6 Furthermore, all results are sent monthly to the airports surveyed as an aid to their management. Thus, they are aware of the performance of their terminals in previous month and they can plan their actions in order to focus on the indicators with unsatisfactory rating. The quarterly publication of the survey results considers the evaluations of all monitored terminals and establishes a positive competition between the airports. Their efforts for improvement ultimately benefit the passengers.

3.7 One of the tools for management actions is the use of a quadrant chart, like the one below, which allows the verification of how the evaluation of a particular indicator relates to the overall satisfaction of passengers at a specific airport and the assessment of this same indicator in other airports monitored. In pursue for better service, focus should be to improve ratings of indicators set in the quadrant “Priorities”.

Chart 2 – Quadrant Chart



#### 4. CONCLUSION

4.1 The new approach of this kind of survey given by SAC worked with innovation since it is promoted by a government agency to evaluate the performance of a relevant public service and it is developed, conducted and monitored by the Brazilian Government. The disclosure of operational performance results of the airports and the perception of its users on the service offered promotes transparency of the quality of air transport infrastructure of the country, allowing the follow-up of the sector by the public, press and others entities involved.

4.2 When guided by planning and monitoring, the actions of government and private sector will always be more accurate, generating less investment inefficiencies. The intention with this is to direct actions in order to expand and improve the level of service at airports, assist the development of regulation for the sector and guidance to implement public policies.