

1-1-2012

Frequent Flier Perceptions and Air Travel Satisfaction: The Airline Passenger Survey 2012

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Bowen, Erin E.; Bowen, Brent D.; and Headley, Dean E., "Frequent Flier Perceptions and Air Travel Satisfaction: The Airline Passenger Survey 2012" (2012). *Airline Passenger Surveys*. Paper 3.
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Dr. Erin E. Bowen is Assistant Professor, Department of Technology Leadership & Innovation within the Purdue University College of Technology. Dr. Bowen is also currently head of the Applied Human Factors Research Laboratory at Purdue. Previously, Dr. Bowen served as Assistant Director of the National Center for Aviation Safety Research at Parks College of Engineering, Aviation and Technology, Saint Louis University. Bowen holds a Doctorate in Industrial-Organizational Psychology with an advanced minor in Research Methodology and a Master of Science (Research) degree in Industrial-Organizational Psychology from Saint Louis University. Dr. Bowen's current research focuses on aviation human factors; statistics and data integration to enhance organizational effectiveness; survey design and implementation; and aviation industry metrics. She has publications in the *International Journal of Applied Aviation Studies*; *Proceedings of the International Symposium on Aviation Psychology*; *Proceedings of the Society for Industrial and Organizational Psychology*, among others, and has presented at numerous conferences and professional meetings. Prior to joining Purdue University, Dr. Bowen served as an aviation research consultant, contributing to FAA-funded projects in the areas of safety culture, air traffic controller safety, and aviation maintenance resource management training. Currently Dr. Bowen is serving as Associate Editor for the *Journal of Aviation Technology & Engineering*, Consulting Editor for the *International Journal of Applied Aviation Studies* and scientific reviewer for multiple professional organizations. Her professional affiliations include the Society for Industrial and Organizational Psychology, American Psychological Association, Human Factors & Ergonomics Society, Association for Aviation Psychology, University Aviation Association, and American Mensa, Ltd.

Dr. Brent Bowen is Professor and Head, Department of Aviation Technology within the Purdue University College of Technology. Previously, Dr. Bowen served as Professor and Chair, Aviation Science, Parks College of Engineering, Aviation and Technology, and directed the office of Air Transportation Policy and served as Senior Fellow for the National Center for Aviation Safety Research at Saint Louis University. Bowen attained his Doctorate in Aviation Sciences from Oklahoma State University and a Master of Business Administration degree from Oklahoma City University. His Federal Aviation Administration certifications include Airline Transport Pilot (Type-rated Douglas DC-3 SIC), Certified Flight Instructor (SEL, MEL, Instrument) with Gold Seal, Advanced- Instrument Ground Instructor, Aviation Safety Counselor, and Aerospace Education Counselor. Dr. Bowen has authored/co-authored numerous successful grand proposals totaling awards exceeding \$25 million and has in excess of 300 publications, papers and professional program appearances to his credit. His research interests focus on aviation applications of public productivity enhancement and marketing channels, specifically in the areas of service quality evaluation, benchmarking, safety and security. Dr. Bowen is an active industry consultant, pilot, and former fixed-base operator and scheduled air carrier operator. Dr. Bowen served on the National Research Council Steering Group on the Small Aircraft Transportation System and was named by the FAA administrator to a National Academy of Science study group on airspace optimization as a component of the Next Generation Air Transportation System. Additionally, Dr. Bowen was appointed by FAA Administrator to serve on a National Academy of Science panel to examine the need to cultivate a future generation of transportation leaders.

Dr. Dean E. Headley is Associate Professor of Marketing in the Department of Marketing at the W. Frank Barton School of Business, Wichita State University. He holds a Doctorate in Marketing and Statistics from Oklahoma State University, a Master of Business Administration degree from Wichita State University, and a Master of Public Health Degree from the University of Oklahoma. Dr. Headley's research interests include methodology development for measurement of service quality, the connection between service quality and consumer behavior, consumer choice processes in service settings, and the effects of marketing activities on consumers and providers of services.

Frequent Flier Perceptions & Air Travel Satisfaction

The Airline Passenger Survey 2012

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Overview

The Airline Passenger Survey is an annual survey of frequent fliers who visit the web site for the Airline Quality Rating. Since 2009, over 4,000 passengers have responded to researchers' request to provide a consumer perspective on the quality of today's air travel experience. Airline Quality Rating researchers at Purdue University and Wichita State University compare the consumer experience of air travel with the objective rankings of the Airline Quality Rating (www.airlinequalityrating.com). These detailed findings are provided publicly and periodically released to the media.

Key Findings from Most Recent Airline Passenger Survey

- Passengers continue to register their disappointment with the air travel experience. Over 53% of frequent fliers say air travel has gotten worse for them in the past year – only 11% thought air travel got better in that time. Unfortunately, this view of an industry that is continuing to fall short of passenger expectations has been a consistent trend since 2009, despite the improvements in the overall AQR scores in that time frame.
- Southwest continues its 3-year trend as the “darling of the flying public” in frequent flier perceptions. In the most recent year's survey, 35% of frequent fliers who responded said Southwest was the most passenger-friendly of the 15 airlines ranked by the AQR. JetBlue, second to Southwest in passenger friendliness, was only selected by 12% of frequent fliers.
- Southwest also continues as the most preferred air carrier, though by a much smaller margin (17%) and most closely followed by the network airlines: American, Delta, and United.
- Southwest's margins over other airlines in passenger preference have continued to narrow since 2009, while the network carriers have made steady gains in preference among frequent fliers and are “nipping at the heels” of Southwest in this area.

- Delta continued to hold onto its spot as the most preferred among network air carriers for the third year.
- While consumers report primarily relying upon price and schedule considerations in selecting their airline, when these considerations are held constant across carriers it is customer service that passengers consider most important (36% of passengers selected) in choosing a carrier, followed closely by on-time arrival (32% of passengers selected).
- Over 54% of frequent fliers report disbelief that airline price and fee increases in the past year are just to offset fuel costs. This is part of the global perception by passengers of an industry that does not have customer service or transparency in providing service as a key goal.
- Regional airlines continue to uniformly fall at the bottom of passenger survey results with regard to consumer preference, perceived passenger friendliness, and use by business or leisure travelers.

2011 Overall Consumer Rankings:

“What is your preferred airline?”

Airline	Percent of consumers who selected:
Southwest	17%
Delta	12%
United	12%
American	11%
JetBlue	10%
Continental	6%
US Airways	5%
Frontier	4%
AirTran	3%
Alaska	2%
Hawaiian	1%
AmericanEagle	0%
ASA	0%
Mesa	0%
Skywest	0%

“Which airline do you think is most passenger-friendly?”

Airline	Percent of consumers who selected:
Southwest	35%
JetBlue	12%
Continental	6%
Alaska	6%
AirTran	5%
Delta	5%
American	4%
Frontier	4%
United	3%
Hawaiian	3%
US Airways	1%
Skywest	1%
AmericanEagle	0%
ASA	0%
Mesa	0%

Additional Findings from the Airline Passenger Survey

The Frequent Fliers:

- Frequent fliers responding to the Airline Passenger Survey continue to be predominately male (79% in the most recent year's survey), but were nearly equally split in flying primarily for business or leisure.
- 28% of passengers reported flying an average of 1-5 times/year; 26% fly 6-10 times per year, 15% report flying 11-15 times per year, and 23% report flying over 21 times/year on average.
- 68.1% of consumers report belonging to 1 or 2 frequent flier programs, while 15.7% of passengers report using no frequent flier program when they book travel.
- Over 70% of frequent fliers responding to the Airline Passenger Survey have a bachelor's degree or higher, and nearly 60% have annual income under \$100,000.
- Southwest has the most-used frequent flier program (13% of consumers report using), followed by Delta (11.5%); United (10.2%); and American (9.9%).
- Very frequent fliers (those who fly more than 20 times/year) report that the number 1 reason for a bad flight experience is poor customer service by the airline.

The Airlines:

The gap between Southwest and its next-closest competitor in passenger preference has narrowed every year since the Airline Passenger Survey began. Most recently, the gap has gone from over 9% between Southwest and Delta in 2009, to just under 6% between Southwest and Delta at the end of 2010, to now only a 5% lead in preference over Delta at the end of 2011.

This trend in airline preference among passengers may indicate performance gains by Delta and other legacy carriers that will eat into Southwest's lead unless they are able to change perceptions and raise preference among new customers.

Regional air carriers continue to be at the bottom in consumer perceptions of both passenger-friendliness and air travel preference. Regionals also continue to be at the bottom of AQR rankings, with the exception of SkyWest, which for the first time in 2012 cracked through the double-digit rankings (now at #9 in the AQR) with significant improvements in performance.

The most significant reason identified for fliers' last **positive** flight experience: 45.5% of consumers said on-time arrival was the biggest factor making the flight positive, while 42.3% said customer service was the biggest factor in a positive experience.

The most significant reason identified for fliers' last **negative** flight experience: 34.3% of passengers said customer service, while 30.4% said on-time arrival (or lack thereof).

Paying a la carte fees for airline services is at the bottom of passengers' wish lists to make up for rising fuel prices. Given a choice of ways to offset rising air travel costs, air passengers would rather drive (32.7%) or pay a higher air ticket price (29%) - or even travel less. And the more frequently passengers report flying in a year, the less they want to be nickel and dimed with fees; only 12.8% of passengers who report flying more than 11 times a year would be willing to pay a la carte fees.

Airlines appear to be doing a poor job of conveying their quality improvements to passengers. Improvements in the four AQR categories (on-time arrival, complaints, denied boardings, and baggage arrival) should be good news for consumers, but passenger survey results show that they aren't seeing it that way. Most frequent fliers do not view the overall experience of air travel positively. The global perceptions passengers have of an industry not concerned with taking care of passengers are weakening the impact of the great strides and successes airlines have made in objective quality performance measures shown in the AQR rankings.

Southwest Airlines has been consistently below the top 3 airlines in the AQR rankings in the last three years, but just as consistently has been viewed as the most passenger-friendly airline by frequent fliers – and by a wide margin. This may also be related to the fact that 36% of passengers ranked Customer Service as the most important of the 4 AQR categories when they choose an airline – likely why Southwest continues to show strong business performance even when they aren't the highest ranked AQR airline.

This view of Southwest as passenger friendly is often true even for frequent fliers who report another airline as their most preferred to fly.

The merger between AirTran (#1 in the AQR rankings) and Southwest (#1 in passenger perceptions of friendliness and preference) will be key to observe in the coming year. Historically such mergers have caused a slide toward the “least common denominator”, with the higher-ranked airline in the AQR losing ground upon merging with a lower-ranked airline. There is potential for Southwest and AirTran to buck this trend given their respective strengths in customer perceptions and objective performance, but it could also mean a decrease in these strengths for both airlines if not well-managed.

There is a critical shortage of information from female frequent fliers. We know they are a significant portion of frequent travelers, and want to encourage them to complete the Airline Passenger Survey this year at www.purdue.edu/aqr

References

All prior AQR reports and additional data from 1990 to Present are available at www.airlinequalityrating.com

Acknowledgements

Media representatives James Schenke, Purdue University & Joe Kleinsasser, Wichita State University