

# AQR Consumer Satisfaction and Preferences

## Survey Results: 2009-2010



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## AQR Consumer Satisfaction and Preferences Survey: 2009

### Overview:

In conjunction with the release of the 2008 Airline Quality Ratings on April 6, 2009, a consumer survey was released on the AQR's official web site, [www.aqr.aero](http://www.aqr.aero). This survey gathered information from the flying public on airline preferences, perceived passenger friendliness, and other issues of critical relevance to passengers and industry leaders, as it regards the 17 airlines ranked in the AQR.

Between April 2009 and February 2010, close to 4,000 individuals completed the online survey. After identifying and eliminating duplicate responses, over 3,400 unique consumer responses remained.

### Key Findings:

- Southwest continues to be the “darling” of the flying public, receiving the highest consumer ratings in every category assessed by the survey, surpassing its competitors by a wide margin in consumer perceptions.
- Regional airlines uniformly fell at the bottom of the survey results with regard to consumer preference, perceived passenger friendliness, and use by business or leisure travelers.
- Only one airline (Southwest) captured enough consumer preference to earn a double-digit percentage of consumers who prefer to fly this carrier (18.6%), making it the only clear “airline of choice” for consumers.
- In all cases, when the percentage of consumers who reported both preferring a particular airline as well as perceiving it to be most passenger-friendly was below 50% for a particular airline, the majority of consumers who preferred the airline but did *not* think it was most passenger-friendly reported Southwest as the most passenger-friendly airline.
- United is the top preferred network carrier among frequent fliers (16+ flights/year).
- Continental is perceived as the most passenger-friendly network carrier overall.
- JetBlue comes in second in consumer preference to Southwest among low-cost carriers at all levels of flight frequency.

## Consumer Rankings:

**“What is your preferred airline?”**

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Southwest	18.6%
Delta	9.5%
Continental	7.8%
United	7.5%
American	7.2%
JetBlue	5.4%
Northwest	5.2%
AirTran	5.0%
Alaska	4.9%
US Airways	4.2%
Frontier	2.3%
Hawaiian	1.3%
Skywest	0.4%
AmericanEagle	0.2%
ASA	0.2%
Comair	0.1%
Mesa	0.1%

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

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Southwest	32.0%
JetBlue	11.3%
Continental	6.9%
AirTran	5.5%
Delta	5.3%
Alaska	4.8%
American	3.5%
United	3.4%
Northwest	2.7%
Frontier	2.5%
Hawaiian	2.5%
US Airways	2.2%
Skywest	0.5%
AmericanEagle	0.3%
ASA	0.2%
Comair	0.1%
Mesa	0.1%

## Consumer Rankings by Airline Category:

**“What is your preferred airline?”**

### *Network Carriers:*

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Delta	9.5%
Continental	7.8%
United	7.5%
American	7.2%
Northwest	5.2%
Alaska	4.9%
US Airways	4.2%
Hawaiian	1.3%

### *Regional Carriers:*

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Skywest	0.4%
AmericanEagle	0.2%
ASA	0.2%
Comair	0.1%
Mesa	0.1%

### *Low-Cost Carriers:*

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Southwest	18.6%
JetBlue	5.4%
AirTran	5.0%
Frontier	2.3%

## Consumer Rankings by Airline Category:

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

### *Network Carriers:*

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Continental	6.9%
Delta	5.3%
Alaska	4.8%
American	3.5%
United	3.4%
Northwest	2.7%
Hawaiian	2.5%
US Airways	2.2%

### *Regional Carriers:*

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Skywest	0.5%
AmericanEagle	0.3%
ASA	0.2%
Comair	0.1%
Mesa	0.1%

### *Low-Cost Carriers:*

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Southwest	32.0%
JetBlue	11.3%
AirTran	5.5%
Frontier	2.5%

**Frequent Flier Rankings**  
**(consumers with 21 or more flights per year):**

**What is your preferred airline?**

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Southwest	14.3%
United	11.2%
Delta	10.6%
Continental	8.6%
American	8.4%
US Airways	7.7%
Northwest	7.5%
AirTran	6.5%
Alaska	4.9%
JetBlue	4.3%
Frontier	2.0%
Hawaiian	0.8%
Skywest	0.8%
AmericanEagle	0.6%
ASA	0.4%
Comair	0.0%
Mesa	0.0%

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

<b>Airline</b>	<b>Percent of consumers who selected:</b>
Southwest	27.7%
Continental	9.4%
JetBlue	9.4%
AirTran	6.5%
Alaska	6.1%
Delta	5.0%
United	4.6%
Northwest	4.1%
American	3.5%
US Airways	3.5%
Frontier	3.3%
Hawaiian	1.3%
Skywest	1.3%
AmericanEagle	0.4%
ASA	0.2%
Comair	0.0%
Mesa	0.0%

## Summary Data:

- Southwest is the most preferred airline, with 18.6% of consumers selecting it, followed by:
  - Delta (9.5%)
  - Continental (7.8%)
  - United (7.5%)
  - American (7.2%)
- Southwest is perceived as the most passenger-friendly airline by consumers:
  - Southwest: 32%
  - JetBlue: 11.3%
  - Continental: 6.9%
  - AirTran: 5.5%
  - Delta: 5.3%
- 11.6% of consumers reporting having no preferred airline.
- Mesa and Comair tied for least-preferred airline, each receiving only 2 votes.
- Southwest has the most used frequent flyer program (13% of consumers report using it), followed by Delta (11.5%); United (10.2%); and American (9.9%).
- 15.7% of consumers report using no frequent flyer program.
- 68.1% of consumers report belonging to between 0-2 frequent flyer programs.
- 69.4% of consumers report that they consider Price to be “very important” in selecting the airline they will fly; 49.7% rated airline Schedule as “very important”; and 48% of consumers rated Customer Service as “very important” in selecting the airline they will next fly.
- 27.8% of passengers report that their decision to fly a specific airline is impacted by news of an accident for that airline; 42.6% disagreed that such was the case, and 29.7% were neutral.
- 19.1% of passengers report that their decision to fly any airline is impacted by news of airline accidents in general; 51.4% disagreed that such is the case, and 29.4% were neutral.
- 54.2% of consumers reported flying from a hub city when they travel.
- 44.9% of consumers reported their primary flight purpose was leisure; 22.7% report primarily flying for business, and 32.4% report flying for both business and leisure equally.
- Most consumers responding to the survey fell between the ages of 25-39 (37.3%), followed by those age 40-55 (32.4%). 18.1% were over 55 years of age, and 12.2% were under 25.
- 42.6% of respondents fly 1-5 times/year on average; 23.9% fly 6-10 times/year, and 14.2% fly 21 or more times/year.



## Additional Analysis:

- Business Travelers:
  - 15.8% prefer Southwest;
  - 10.4% prefer Delta;
  - 9.4% prefer Continental;
  - 8.6% prefer American Airlines
- Leisure Travelers:
  - 19.4% prefer Southwest;
  - 9.9% prefer Delta;
  - 7% prefer Continental;
  - 6.3% prefer American.
  - 15.3% have no preference.
- Joint Business/Leisure Travelers (travel for both reasons equally):
  - 19.5% prefer Southwest;
  - 8.4% prefer United;
  - 8.1% prefer Delta;
  - 7.6% prefer Continental.
  - 9.2% have no preference.
- Consumer Ages and Airline Preferences:
  - < 25 years old: Southwest (14.4%)
  - 25-39 years old: Southwest (19%)
  - 40-55 years old: Southwest (18.1%)
  - > 55 years old: Southwest (21.8%)
- Flight Frequency and Preference:
  - > 21 times/year: Southwest (14.2%)
  - 16-20 times/year: Southwest (19.4%)
  - 11-15 times/year: Southwest (18.3%)
  - 6-10 times/year: Southwest (20.2%)
  - 1-5 times/year: Southwest (19.4%)
- Airlines with the lowest passenger-friendliness ratings were:
  - Comair: 0.1%
  - Mesa: 0.1%
  - ASA: 0.2%
  - AmericanEagle: 0.3%
  - Skywest: 0.5%
  - US Airways: 2.2%
- Biggest reason for last **positive** flight experience: 45.5% of consumers said the on-time arrival was biggest factor making the flight positive, 42.3% said customer service was biggest factor for positive experience.
- Biggest reason for last **negative** flight experience: 34.3% said customer service, 30.4% said on-time arrival.
- Flight Frequency and Perceived Friendliness:
  - > 21 times/year: Southwest (27.7%)
  - 16-20 times/year: Southwest (29.6%)
  - 11-15 times/year: Southwest (33.9%)
  - 6-10 times/year: Southwest (34.6%)
  - 1-5 times/year: Southwest (32.2%)

- **Airline Preference and Perceived Friendliness – key findings:**
  - American Airlines – only 30.8% of consumers who said their preferred airline was American also said that American was the most passenger-friendly airline. 29.9% of consumers who said American was their preferred airline said Southwest was the most passenger-friendly.
  - Delta – only 38.5% of consumers who said Delta was their preferred airline also said it was most passenger-friendly. 21.7% of consumers who prefer Delta said Southwest was the most passenger-friendly.
  - Northwest – only 37.8% of passengers who preferred Northwest said they were most passenger-friendly. 17.9% of consumers who prefer Northwest said Southwest was most passenger-friendly.
  - United – only 33.5% of consumers who prefer United also said it was most passenger-friendly; 20.3% of consumers who prefer United reported Southwest as the most passenger-friendly airline.
  - US Airways – only 31.9% of consumers who prefer US Airways also said it was most passenger-friendly. 28.3% of consumers who prefer US Airways reported that Southwest is most passenger-friendly.
  - Southwest – 91% of consumers who prefer to fly Southwest also said it was the most passenger-friendly.
  
- Ratings of the importance of customer service to airline selection are far more spread out among consumers who prefer Regional carriers, compared to consumers who prefer Network or Low-Cost carriers; generally, consumers who prefer Network carriers or Low-Cost carriers tend to heavily weight customer service as “somewhat” or “very” important. Passengers who prefer Regional carriers did not tend to weight customer service so heavily. A similar distribution was seen for the importance of flight schedule in selecting a carrier.

## Airline-Specific Findings

- **AirTran**
  - 4.7% of consumers report using AirTran's frequent flyer program most often.
  - 5.0% of consumers report AirTran as their preferred airline.
  - 48.8% of consumers who prefer AirTran fly primarily for Leisure.
  - 74.8% of consumers who prefer to fly AirTran also report it as being most passenger-friendly.
  - 6.5% of very frequent flyers (21+ flights/year) report AirTran as the most passenger-friendly airline.
  - 6.5% of very frequent flyers (21+ flights/year) report AirTran as their preferred airline.
  
- **Alaska**
  - 5.0% of consumers report using Alaska's frequent flyer program most often.
  - 4.9% of consumers report Alaska as their preferred airline.
  - 41.4% of consumers who prefer Alaska fly primarily for Leisure.
  - 66.7% of consumers who prefer to fly Alaska also report it as being most passenger-friendly.
  - 6.1% of very frequent flyers (21+ flights/year) report Alaska as the most passenger-friendly airline.
  - 4.8% of very frequent flyers (21+ flights/year) report Alaska as their preferred airline.
  
- **American Airlines**
  - 9.9% of consumers report using American's frequent flyer program most often.
  - 7.2% of consumers report American as their preferred airline.
  - 39.2% of consumers who prefer American fly primarily for Leisure.
  - 30.8% of consumers who prefer to fly American also report it as being most passenger-friendly.
  - 3.5% of very frequent flyers (21+ flights/year) report American as the most passenger-friendly airline.
  - 8.3% of very frequent flyers (21+ flights/year) report American as their preferred airline.
  
- **AmericanEagle**
  - 0.2% of consumers report AmericanEagle as their preferred airline.
  - 0.4% of very frequent flyers (21+ flights/year) report AE as the most passenger-friendly airline.
  - 0.6% of very frequent flyers (21+ flights/year) report AmericanEagle as their preferred airline.
  
- **Atlantic Southeast Airlines (ASA)**
  - 0.2% of consumers report ASA as their preferred airline.
  - 0.2% of very frequent flyers (21+ flights/year) report ASA as the most passenger-friendly airline.
  - 0.4% of very frequent flyers (21+ flights/year) report ASA as their preferred airline.

- **Comair**
  - 0.1% of consumers report Comair as their preferred airline.
  - 0% of very frequent flyers (21+ flights/year) report Comair as the most passenger-friendly airline.
  - 0% of very frequent flyers (21+ flights/year) report Comair as their preferred airline.
  
- **Continental**
  - 6.6% of consumers reporting using Continental's frequent flyer program most often.
  - 7.8% of consumers report Continental as their preferred airline.
  - 40.5% of consumers who prefer Continental fly primarily for Leisure.
  - 59.4% of consumers who prefer to fly Continental also report it as being most passenger-friendly.
  - 9.4% of very frequent flyers (21+ flights/year) report Continental as the most passenger-friendly airline.
  - 8.5% of very frequent flyers (21+ flights/year) report Continental as their preferred airline.
  
- **Delta**
  - 11.5% of consumers report using Delta's frequent flyer program most often.
  - 9.5% of consumers report Delta as their preferred airline.
  - 47.1% of consumers who prefer Delta fly primarily for Leisure.
  - 38.5% of consumers who prefer to fly Delta also report it as being most passenger-friendly.
  - 5.0% of very frequent flyers (21+ flights/year) report Delta as the most passenger-friendly airline.
  - 10.6% of very frequent flyers (21+ flights/year) report Delta as their preferred airline.
  
- **Frontier**
  - 1.7% of consumers report using Frontier's frequent flyer program most often.
  - 2.3% of consumers report Frontier as their preferred airline.
  - 46.1% of consumers who prefer Frontier fly primarily for Leisure.
  - 73.6% of consumers who prefer to fly Frontier also report it as being most passenger-friendly.
  - 3.3% of very frequent flyers (21+ flights/year) report Frontier as the most passenger-friendly airline.
  - 2.0% of very frequent flyers (21+ flights/year) report Frontier as their preferred airline.
  
- **Hawaiian**
  - 0.8% of consumers report using Hawaiian's frequent flyer program most often.
  - 1.3% of consumers report Hawaiian as their preferred airline.
  - 52.2% of consumers who prefer Hawaiian fly primarily for Leisure.
  - 76.2% of consumers who prefer to fly Hawaiian also report it as being most passenger-friendly.
  - 1.3% of very frequent flyers (21+ flights/year) report Hawaiian as the most passenger-friendly airline.
  - 0.8% of very frequent flyers (21+ flights/year) report Hawaiian as their preferred airline.

- **JetBlue**
  - 2.4% of consumers report using JetBlue's frequent flyer program most often.
  - 5.4% of consumers report JetBlue as their preferred airline.
  - 49.4% of consumers who prefer JetBlue fly primarily for Leisure.
  - 76.7% of consumers who prefer JetBlue also report it as being most passenger-friendly.
  - 9.4% of very frequent flyers (21+ flights/year) report JetBlue as the most passenger-friendly airline.
  - 4.2% of very frequent flyers (21+ flights/year) report JetBlue as their preferred airline.
  
- **Mesa**
  - 0.1% of consumers report Mesa as their preferred airline.
  - 0% of very frequent flyers (21+ flights/year) report Mesa as the most passenger-friendly airline.
  - 0% of very frequent flyers (21+ flights/year) report Mesa as their preferred airline.
  
- **Northwest**
  - 6.6% of consumers report using Northwest's frequent flyer program most often.
  - 5.2% of consumers report Northwest as their preferred airline.
  - 38.1% of consumers who prefer Northwest fly for both business and leisure equally.
  - 37.8% of consumers who prefer Northwest also report it as being most passenger-friendly.
  - 4.1% of very frequent flyers (21+ flights/year) report NWA as the most passenger-friendly airline.
  - 7.5% of very frequent flyers (21+ flights/year) report NWA as their preferred airline.
  
- **Skywest**
  - 0.4% of consumers report Skywest as their preferred airline.
  - 1.3% of very frequent flyers (21+ flights/year) report Skywest as the most passenger-friendly airline.
  - 0.8% of very frequent flyers (21+ flights/year) report Skywest as their preferred airline.
  
- **Southwest**
  - 13.0% of consumers report using Southwest's frequent flyer program most often.
  - 18.6% of consumers report Southwest as their preferred airline.
  - 46.7% of consumers who prefer Southwest fly primarily for Leisure.
  - 91% of consumers who prefer Southwest also report it as being most passenger-friendly.
  - Only airline to have more passengers who prefer to fly it report that they do *not* fly from a hub city.
  - 27.7% of very frequent flyers (21+ flights/year) report SWA as the most passenger-friendly airline.
  - 14.2% of very frequent flyers (21+ flights/year) report SWA as their preferred airline.

- **United**

- 10.2% of consumers report using United's frequent flyer program most often.
- 7.5% of consumers report United as their preferred airline.
- 36.4% of consumers who prefer United fly for both business and leisure equally.
- 33.5% of consumers who prefer to fly United also report it as being most passenger-friendly.
- 4.6% of very frequent flyers (21+ flights/year) report United as the most passenger-friendly airline.
- 11.2% of very frequent flyers (21+ flights/year) report United as their preferred airline.

- **US Airways**

- 5.4% of consumers report using US Airways frequent flyer program most often.
- 4.2% of consumers report US Airways as their preferred airline.
- 36.3% of consumers who prefer US Airways fly for Business (only airline to have more consumers who prefer report primarily flying for business than either leisure or both business/leisure equally).
- 31.9% of consumers who prefer to fly US Airways also report it as being most passenger-friendly.
- 3.5% of very frequent flyers (21+ flights/year) report US Airways as the most passenger-friendly airline.
- 7.7% of very frequent flyers (21+ flights/year) report US Airways as their preferred airline.