



qualtrics^{XM}

Airline Pain Index 2019

Intro

If life's a journey, just how painful is the ride? From crowded flights, to exotic 'service' pets, to opaque carry-on rules, modern air travel can be a complex experience. Qualtrics Industry Pain Indexes look at common frustrations and issues that customers experience across various industries. Using data from a cross-section of consumers, these studies do not compare companies, but rather focus instead on industry-wide trends. First up: Airlines.

What we measured

In this study, we examine commercial airlines and the common experiences passengers have throughout their interactions with an airline.

This study focuses on travelers' specific pain points and how much those pain points impact their likelihood to return to an airline. The research addresses other key topics of interest that relate to a customer's experience, including:

- + Preferences and opinions of passengers
- + General aspects of flying
- + Issues with other passengers
- + Booking decisions
- + Premium flyer preferences
- + Airplane comfort
- + Pricing and fees

For this study, we looked at passengers globally. However, we also highlighted any noteworthy differences in the results based on different geographies.

The study examines common pain points, how much passengers are bothered by those experiences, and whether any of those issues discourage them from flying with that airline again. Throughout the study, passengers ranked each separate pain point on the following scale:

- + Does not bother me
- + Bothers me a little
- + Bothers me a lot
- + Bothers me so much it makes me never want to fly with the airline again

What we found

PAIN POINTS AND DEAL BREAKERS

Passengers identified which negative experiences, or "pain points", from flying would stop them from traveling with an airline again.

For each of the top five pain points, at least 84% of passengers said that it either bothered them a lot or made them not want to fly with the airline again.

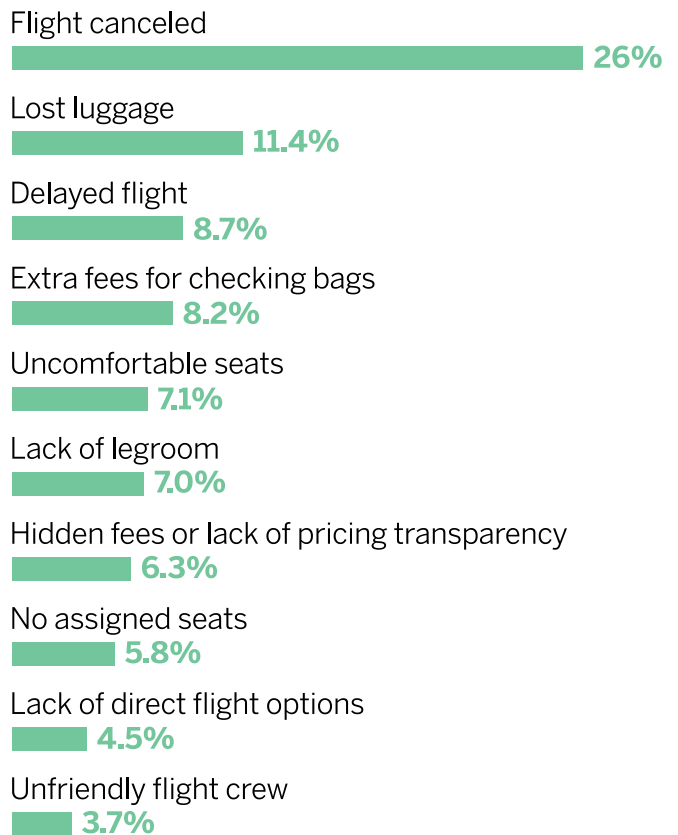
TOP 5 REASONS PASSENGERS NEVER FLY WITH AN AIRLINE AGAIN

1. Lost luggage
2. Hidden fees
3. Flight canceled
4. Unfriendly flight crews
5. Unclean lavatories

Since the 2017 Qualtrics Airline Pain Index, canceled flights rose into the top three and while unfriendly flight crews dropped out of it. Though this only represented a three percentage point increase for canceled flights, unfriendly flight crews dropped nine points overall. This suggests a considerable change in the passenger opinion on the behavior of their flight crews — either lower expectations and a greater willingness to give the benefit of the doubt or a step forward in the experience provided by flight crews.

Additionally, the study asked respondents to pick the single most frustrating experience they could have while flying.

THE TOP 10 MOST FRUSTRATING EXPERIENCES



DIRECT FLIGHTS

2X Women are twice as likely as men to cite lack of direct flights as the most frustrating pain point

FREQUENT FLYERS

32% Travelers without airline status are 32% more likely to say canceled flights are the most frustrating

We also looked at which interactions with other passengers were most likely to cause passengers to quit an airline because some passengers leave an airline due to interactions with other passengers.

TOP 5 PASSENGER-TO-PASSENGER INTERACTIONS THAT CAUSE PEOPLE TO QUIT AN AIRLINE

1. Sitting near a drunk passenger
2. Sitting near someone who smells bad
3. Noisy children/crying babies
4. Sitting next to a very large person
5. Parents who aren't attentive to their children

Though passengers are less likely to hold an airline responsible for a bad interaction with a fellow passenger, they were quite likely to be bothered a lot by one of these interactions.

The following list covers the interactions passengers most frequently find very bothersome but do not cause them to quit an airline.

5 MOST BOTHERSOME PASSENGER-TO-PASSENGER PAIN POINTS

1. Sitting near a passenger who smells bad
2. The passenger behind you kicks your seat
3. Sitting near a drunk passenger
4. Someone loudly arguing with a fellow passenger or flight attendant
5. Parents who aren't attentive to their children

Once again, who the passenger is affects how they view these experiences. Non-parents are 2x as likely to find noisy children/crying babies as the most frustrating passenger interaction. On the other hand, parents are 2x as likely to find the passenger in front of them reclining their seat to be the most frustrating passenger interaction.

Problems with other passengers created generational divides as well. Baby boomers are 20% more likely than millennials to be bothered a lot by parents who are inattentive to their children. Meanwhile, millennials are 43% more likely than baby boomers to be bothered a lot by having another passenger ask to switch seats at the beginning of a flight.

THE POWER OF A BAD EXPERIENCE

No matter how many times someone flies or how many different experiences they have, the most powerful experiences they have, good or bad, tend to stick with them. Ideally, airlines can create special moments that stick with their passengers for the right reasons.

However, extremely bad experiences are also prevalent:

39% of passengers have had an experience that was so bad they decided to never fly with that airline again.

More than 1 in 3 passengers (37%) has had a bad experience on a flight or with an airline that ruined a vacation for them.

15% of passengers have had an experience with a flight that was so bad it drove them to tears

These experiences happen and some cannot be controlled. Yet passengers who said they'd had an experience that would cause them never to fly with that airline again were more likely to cite more controllable factors as their single greatest frustration.

Passengers who have quit an airline are:

- 2.5X more likely to cite the cabin temperature
- 2.3X more likely to cite poor in-flight service
- 1.8X more likely to cite unfriendly flight crews
- 1.5X more likely to cite uncomfortable seats

They were no more likely to cite less controllable factors such as delayed flights than other passengers and they were even less likely (0.7X) to cite lost luggage as a leading frustration. This suggests that the bad experiences most likely to turn someone away are the more avoidable ones or the unavoidable ones that an airline handles poorly.

GRADING THE AIRLINE INDUSTRY

When asked to grade the airline industry as a whole, the average grade given in the US and globally was a B. Canada gave the industry an above-average grade of a B+ while Australia gave a B-. Specifically, 25% of respondents gave a grade of A- or higher and only 10% gave it a C or worse.

The study found that passengers who give the industry a grade of A- or better are less likely to cite any of the following pain points as a reason they would not fly with that airline again:

- 19% less likely to cite flight canceled
- 13% less likely to cite lost luggage
- 7% less likely to cite hidden fees

Passengers who generally fly for business reasons are both 38% more likely to give the industry an A than those who fly for personal reasons. Passengers who prefer the window seat are 40% more likely to give the industry an A than those who prefer seats on the aisle.

WHO LIKES THE MIDDLE?

It's easy to assume that everyone who flies regularly is either a window or an aisle person, however, it turns out that a handful of passengers do actually prefer the middle seat.



This begs the question: what type of people actually prefer the middle? Well, the results showed that people in a separated marriage are 5X more likely to prefer the middle seat than married passengers. Less surprisingly, people who prefer the middle seat are 46% and 59% more likely than those who prefer the window and aisle respectively to have had a fellow passenger ruin their experience on a flight.

Of the portion of the population who prefers the window or aisle, they were evenly split into most categories with one notable exception: People who prefer the window are 25% more likely to always look forward to flying as those who prefer the aisle.

PETS ON PLANES

Over 10% of passengers have flown with an animal — pet or service animal — at some point and, having had experience with the process, the study asked them what portion of animals flying as emotional support animals were really just pets. It turns out that passengers in that group are generally suspicious of the legitimacy of many of the animals they encounter while flying.

In fact, 100% of them believed that some of the animals flying under the title of service animals are just normal pets. Half of those who have flown with an animal think at least 60% of emotional support animals on flights are falsely claimed

HOW PASSENGERS CHOOSE FLIGHTS

The study also examined passengers' interactions with an airline before the trip itself. The most common factors for passengers to consider other than price are:

1. Timing of the flight
2. Most direct route
3. Length of layovers

Additionally, 35% of passengers would pass on the cheapest flight option to stick with their loyalty program.

Outside of logistical factors, passengers care more about the recent press on an airline, recommendations of friends, and online passenger reviews than expert reviews. In fact, reviews from experts in the media and elsewhere were ranked lowest on the list of factors to consider.

However, a passenger's past experiences with an airline can override everything else. We've covered the power of bad experiences but, **after a good experience with a flight:**

23% of people say they will always try to fly with that airline again.

PREMIUM FLYERS, PREMIUM EXPECTATIONS

When considering the passenger experience with an airline, it's important to consider the experience of premium status flyers — as they are the airlines' most loyal patrons — and what keeps them coming back.

The top 5 most important benefits that come with premium status, accompanied by the portion of passengers who chose each as one of their top 3, were:

- 1.** Free checked bags
- 2.** Free seating upgrades
- 3.** Priority at check-in, security, and baggage claim
- 4.** Free flight changes
- 5.** Extra point/mile benefits

Passengers without status care about the complimentary amenities they receive, but not nearly as much as those with status do. Premium flyers were notably more likely to claim that losing certain amenities would cause them to switch the airline they use.

When asked which benefits would cause them to leave an airline if they were no longer granted, premium flyers ranked the following as the top 5:

- 1.** Free checked bags
- 2.** Free flight changes
- 3.** Priority at check-in, security, and baggage claim
- 4.** Free seating upgrades
- 5.** No ticketing and processing fees

Airlines make sure their most loyal customers are taken care of when it comes to universal frustrations like canceled flights. For instance, passengers without any airline status are 32% more likely than those with it to cite canceled flights as the most frustrating experience. However, these same passengers prove to be hard to please or at least easy to displease.

Passengers with status are at least 2X as likely to cite the following passenger interactions as making them not want to fly on that airline again:

- + Someone loudly arguing with a fellow passenger or flight attendant
- + Having to move repeatedly to let another passenger into the aisle
- + Passenger next to you falls asleep on you
- + Passengers who are inconsiderate about how they stow carry-on luggage
- + Sitting near someone who is loud
- + Noisy children/crying babies
- + Passenger in front of you reclines his/her seat
- + Passenger behind you kicks your seat

Conclusion

The results of the 2019 Qualtrics Airline Pain Index showed that lost luggage, hidden fees, and cancelled flights were the “deal breaker” experiences that are most likely to turn passengers away from an airline. When it came to fellow passengers, 2 out of 3 people were bothered a lot by sitting near someone who smells bad, having the passenger behind them kick their seat, or sitting near a drunk passenger. More generally, passengers gave the industry a “B” as an average grade for the overall experience provided.

However, 39% of passengers still have had an experience so bad it has caused them to never fly with a particular airline again. The good news is that there is room to improve on this last number. Those passengers were significantly more likely to cite some of the more controllable aspects of flying as their greatest frustrations when flying — such as poor in-flight service and unfriendly flight crews.

The results demonstrate the importance of managing the passenger experiences throughout their journey with an airline. All it takes is one bad moment to ruin a flight and maybe even the whole trip. Thus, these moments can be the difference between growing a loyal customer and turning one away forever.

Methods

This study was conducted with a panel of over 1,700 global airline travelers. All respondents in the study were at least 18 years of age.

All findings included in this report were statistically significant at a 95% confidence level and a $\pm 3\%$ margin of error.