

## Customer Satisfaction with Airports Declines Sharply Amid an Industry Fraught with Flight Delays

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Philadelphia International, Chicago Midway International and Dallas Love Field Airports Rank Highest in Overall Passenger Satisfaction

Affected by an air travel industry laden with flight delays and cancellations caused by weather, air traffic issues and staff and service cutbacks, customer satisfaction with airports is down significantly, according to the J.D. Power and Associates 2008 North America Airport Satisfaction Study(SM) released today.

The study, now in its eighth year, measures overall airport satisfaction in three segments: large (30 million or more passengers per year), medium (10 million to 30 million passengers per year) and small (fewer than 10 million passengers per year). Six factors -- assessed through 27 specific attributes -- are examined to determine overall customer satisfaction: airport accessibility, baggage claim, check-in/baggage check process, terminal facilities, security check, and food and retail services.

The study, which coincided with a period of notably high rates of flight delays between April 2007 and May 2008, finds that overall satisfaction is 675 on a 1,000-point scale in 2008 -- down 14 points from 2007. Prior to 2007, customer satisfaction with airports increased steadily between 2002 and 2006. More than one in five passengers report experiencing a delay. In addition, customer satisfaction with airports is considerably lower than satisfaction levels in other aspects of the travel industry in which the company conducts studies: hotels (758), rental cars (750) and airlines (687).

"When air passengers are forced to wait out delays in airports for departing flights, they are essentially a captive audience, and their frustration and stress levels affect their satisfaction with airport operations and amenities," said Jim Gaz, senior director of travel and entertainment at J.D. Power and Associates. "Those airports that are best equipped to handle delayed passengers with comfortable seating, a variety of food and beverage options and restrooms located near departure gates are the ones that will perform better in customer satisfaction in these trying times. When delayed passengers arrive at their destination airports, they are seeking efficient service at baggage claim and an expedient exit. Any additional inconveniences will only compound their dissatisfaction with the airport experience."

In particular, customer satisfaction with the security check aspect of the airport experience has declined considerably since 2007.

"Service inconsistencies in the security check process from airport to airport are particularly frustrating for customers, who report lower satisfaction with the professionalism of security staff and the ability of the security check process to make them feel safe, compared with 2007," said Gaz.

### **Large Airports**

Philadelphia International (PHL) ranks highest in overall customer satisfaction among large airports, improving by five rank positions since 2007 and performing particularly well in the terminal facilities and baggage claim factors. PHL is followed closely in the segment rankings by McCarran International (LAS) and Orlando International (MCO), in a tie. LAS performs particularly well in the airport accessibility and check-in/baggage check process factors while MCO performs well in the security check factor.

### **Medium Airports**

Chicago Midway International (MDW) ranks highest among medium-size airports, and performs particularly well in three of the six factors: airport accessibility, terminal facilities and baggage claim. LaGuardia International (LGA) improves by one rank position since 2007 to follow MDW in the segment rankings. Following LGA are Memphis International (MEM), Ronald Reagan Washington National (DCA) and Tampa International (TPA), in a tie. TPA performs particularly well in the check-in/baggage check process and security check factors.

### **Small Airports**

Among small airports, Dallas Love Field (DAL) ranks highest, improving by one rank position since 2007 and performing particularly well in the airport accessibility, security check and terminal facilities factors. Houston Hobby International (HOU) and San Antonio International (SAT), respectively, follow in the rankings.

"Overall, satisfaction scores have declined since 2007 for 48 of the 60 airports included in the 2008 study," said Gaz. "Those airports that have maintained consistent levels of satisfaction and service demonstrate the greatest gains in the rankings."

The study also finds several other key airport passenger patterns:

Among customers reporting that their flight was delayed, the length of the delay was 68 minutes, on average.

The percentage of customers checking bags has declined considerably, from 77 percent in 2007 to 66 percent in 2008.

Males are less satisfied with the security check aspect of their airport experience than are females, on average. Among males, the average satisfaction score is 655 for security check, while among females the average score is 668.

Passengers are typically more satisfied with their experiences in connecting airports than in originating or destination airports. On average, connecting passengers spend 82 minutes waiting for their connecting flight. Satisfaction with the connecting airport begins to decline when the wait is longer than 90 minutes.

Customers spent slightly less money on food and beverage purchases in 2008 (\$11.22), compared with 2007 (\$11.91). Retail spending, however, has decreased by an average of \$4.00, from \$25.54 in 2007 to \$21.54 in 2008.

The 2008 North America Airport Satisfaction Study is based on responses from more than 21,165 passengers who took a round-trip flight between April 2007 and March 2008. Passengers evaluated up to three different airports -- their departing and arriving airport, and if applicable, their connecting airport -- for a total of more than 36,500 evaluations.

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