

APEX PASSENGER INSIGHTS STUDY

WHERE SHOULD AIRLINES INVEST THEIR RESOURCES?



7 in 10 fliers cite comfort and ambience as their #1 priority.



Satisfaction with cabin comfort decreases as passenger weight increases.

North Americans (no surprise) are the heaviest fliers and also the least satisfied with cabin comfort. Asian fliers (the lightest) are most satisfied.

Lowest satisfaction among air travelers: Seat width, leg room, and distance to neighbor.

Out of ten cabin amenities tested, extra leg room is by far the most desired followed by more comfortable seats and more distance on the sides of passengers (arm room).



6 in 10 fliers say they would pay for extra leg room.

ARE UPGRADES TO PREMIUM CLASSES WORTH IT?

All Signs Point to Yes



Passengers who upgraded were significantly more satisfied with their most recent flight than those who did not upgrade.



More than 8 in 10 recent travelers say they would upgrade again.

3 in 10 non-Economy class fliers paid for an upgrade and the vast majority feel their upgrade was worth the price.



There is a significant difference in satisfaction with cabin comfort between those in Premium Economy/Economy Plus and those in regular Economy.

Economy Plus passengers are 2x as satisfied with leg room as those in regular Economy (64% vs. 32% very/somewhat satisfied).



Passengers who opt for a higher class of service have a more restful flight.

Those in First/Business/Premium Economy are significantly more likely to sleep on their flight compared to Economy/Economy Plus fliers. Passengers also become more sociable as class of service increases.

IN ADDITION TO CABIN COMFORT, THERE IS A DIRECT RELATIONSHIP BETWEEN CLASS OF SERVICE AND SATISFACTION WITH THE BOARDING PROCESS AND FLIGHT ATTENDANT ATTENTIVENESS.

DO AIRLINE LOYALTY PROGRAMS INCREASE CUSTOMER LOYALTY?

The Answer Seems To Be Yes



Half of frequent flier members and three-quarters of those with status say that their mileage program/status was the biggest factor in booking their most recent flight.



Eight in ten First Class passengers say the mileage program/status was the number one factor in their booking. Younger travelers (under age 45) are more likely than those age 45+ to consider this most important.

6 in 10 fliers (three-quarters of North Americans) are currently members of a frequent flier program.



3 in 10 have elite or premier status.

65%



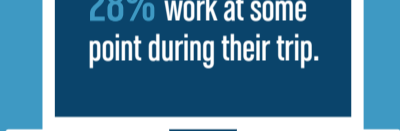
55%



Males are more likely than females to be frequent flier members.

Given the importance of these programs to travelers, airlines would be wise to increase membership, especially among their female customers.

HOW DO PASSENGERS SPEND THEIR TIME INFIGHT?



28% work at some point during their trip.



6 in 10 travelers talked to other passengers during their last flight.

Asian travelers were more likely than those from other regions to talk to others.



At least 1 in 4 spend over 25% of time listening to music and watching movies.

In addition to sleeping and reading, listening to music, and watching movies are the activities that account for the most time spent during a flight.



Only about a 1/3 of travelers spent any time surfing the Internet or social networking on their last flight.

ARE AIRLINE APPS CATCHING ON WITH FLIERS?



Over half of all passengers (**55%**) have downloaded an airline's mobile app

Two-thirds of Asian fliers (78% of Chinese) have done so compared to about half of North Americans and Europeans.



The most popular/desired uses for an airline app are to check flight status, check rates, make a reservation, and check-in for a flight.



While most travelers, especially North Americans, are wary of information sharing to network with other passengers in-flight, over two-thirds of Asian fliers (including 81% of Chinese and 74% of Indian travelers) are open to the idea.

HOW DO PASSENGERS FEEL ABOUT IN-FLIGHT ENTERTAINMENT?



Fewer than one in five travelers are "very satisfied" with it overall



Movie selection is the most important aspect of in-flight entertainment and many now expect to receive this for free.

7 in 10 were at least somewhat impacted if there was no in-flight entertainment offered

3 in 10 were greatly impacted if there was no in-flight entertainment offered



Passengers are very pleased with complimentary Wi-Fi

but movies and TV presented on an overhead screen receives a low satisfaction score.



Most travelers these days (especially in North and South America) bring their own headphones on board, many of which are noise cancelling.



Airline passengers overwhelmingly prefer individual in-seat screens over other modes for viewing in-flight entertainment. 7 in 10 say it is their preferred method.

WHAT DO PASSENGERS WANT AND EXPECT WHEN IT COMES TO FOOD & BEVERAGE?



Taste, variety and healthy options are the three most important aspects of the in-flight meal

Asian travelers place much more emphasis than other regions on healthy options, while North Americans are more concerned with taste and variety.



Very satisfied



Somewhat satisfied

Overall Satisfaction: Europeans were significantly more satisfied than North Americans.

Most passengers didn't purchase any food or beverages in-flight, and North Americans were least likely to do so. North Americans were also least likely to receive a complimentary meal.



Meeting dietary needs is critical for passengers from Jordan, Malaysia and Indonesia

Premium Economy/Economy Plus passengers are more likely than those in regular Economy class to purchase food and beverages.



HOW MUCH ARE PASSENGERS IMPACTED BY DELAYS?



1 in 4 passengers affected if delay > 30 minutes. A quarter of delayed passengers with connections missed their connection

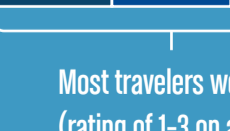
LEVEL OF SATISFACTION WITH THE WAY THEIR DELAY WAS HANDLED BY THE AIRLINE



Most travelers were "less than satisfied" (rating of 1-3 on a 5-point scale)



Passengers who were delayed are more than 2x as likely to be "less than satisfied" with their most recent flight compared with those who were not delayed (36% vs. 16% less than satisfied).



Travelers in Latin America were the most likely to experience at least some type of delay