



Press Release

J.D. Power and Associates Reports: Satisfaction with Baggage Claim Declines Considerably as Airport Security Regulations Drive Higher Volumes of Checked Baggage

Dallas/Fort Worth International, Kansas City International, and Houston Hobby International Airports Rank Highest in Overall Passenger Satisfaction

WESTLAKE VILLAGE, Calif.: 22 May 2007 — Air travelers are notably less satisfied with the baggage claim process, as the implementation of new security regulations that limit liquids in carry-on bags has led to a considerable increase in the amount of checked baggage, according to the J.D. Power and Associates 2007 North America Airport Satisfaction StudySM released today.

The study, now in its seventh 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). Eight factors—assessed through 28 specific questions—are examined to determine overall customer satisfaction (in order of importance): airport accessibility, baggage claim, check-in/baggage check, terminal facilities, security check, food and beverage, retail services, and immigration/customs control.

The percentage of survey respondents who report checking baggage increased from 67 percent in 2006 to 77 percent. While customer satisfaction levels increased for the check-in process overall across the industry compared with 2006, satisfaction with baggage claim declined notably, particularly for large airports.

“Travelers have become more likely to check their bags as they face greater restrictions on what they can bring on board, and that has created an added burden on the baggage claim process,” said Jim Gaz, senior director of travel and entertainment at J.D. Power and Associates. “Baggage claim has the greatest impact on overall satisfaction, along with airport accessibility. While airports appear to be managing the additional baggage volume at check-in, they have considerable room for improvement in making sure bags are delivered to passengers quickly and efficiently.”

The study also finds that in markets with multiple airports that serve adjacent communities, customers report little difference in overall satisfaction between major airports—which are busier and larger—and neighboring secondary airports. Monopoly airports, which are the sole airports in their communities, also have satisfaction scores roughly equal to those of major and secondary airports.

“Although one might expect competition for customers in a local market to increase the levels of customer service, this has yet to materialize in the airport sector,” said Gaz. “Customers in communities that are serviced by only one airport are just as satisfied as customers whose communities offer alternative airports.”

Dallas/Fort Worth International (DFW) ranks highest in overall customer satisfaction among large airports, followed closely by Detroit Metropolitan Wayne County (DTW) and Hartsfield-Jackson Atlanta (ATL). Dallas/Fort Worth International performs well in food and beverage and retail services. Detroit Metropolitan Wayne County improves notably in airport accessibility, security check and terminal facilities, while Hartsfield-

Jackson Atlanta demonstrates considerable improvement in check-in/baggage check, airport accessibility and security check.

Kansas City International (MCI) ranks highest among medium-size airports, improving considerably in all eight measures compared with the 2006 study. In particular, MCI improves significantly in security check. Following in the rankings are Sacramento International (SMF) and LaGuardia International (LGA).

“Kansas City International recently contracted with a private security firm to conduct security checks, and succeeded in reducing security screening wait times by three minutes on average,” said Gaz. “While it is too early to tell if adopting a private security firm will result in this kind of improvement for other airports, changes in the security process have helped MCI improve customer satisfaction.”

Among small airports, Houston Hobby (HOU) ranks highest for a second consecutive year, with particularly high ratings in security check. Dallas Love Field (DAL), which tied for highest rank in 2006, and San Antonio International (SAT) follow HOU closely in a tie. DAL receives particularly high ratings in baggage claim, while SAT performs well in airport accessibility and check-in/baggage check.

The study also finds that wait times are a key determinant of airport customer satisfaction. In particular, satisfaction with security check and baggage claim are strongly impacted by timeliness, with passengers tolerating wait times up to 17 minutes before satisfaction drops to below-average levels. In addition, for every five minutes of wait time in a security screening line, satisfaction drops by an average of 21 index points. For baggage claim, the decrease is approximately 12 index points after every five-minute interval.

“While some waiting is unavoidable in airport travel, several airports have employed innovative methods to reduce wait times and manage customer expectations,” said Gaz. “For example, Hartsfield-Jackson Atlanta International manages customer expectations by giving passengers the opportunity to review wait times on its Web site and to sign up for electronic updates. These efforts go a long way in enhancing the experience and changing attitudes of customers who generally find air travel inconvenient and stressful.”

The study also finds several other key airport passenger patterns:

- Customer satisfaction levels flattened in 2007, after climbing steadily between 2002 and 2006.
- One in five travelers experiences a flight delay—a 12 percent increase over 2006. Leading reasons for flights delays are bad weather (31%), unavailability of aircraft (20%) and mechanical problems (14%).
- Satisfaction with retail services posts the greatest decline of the measures studied, driven by decreases in satisfaction with cost and variety of products. On average, airport consumers spend \$25.54 on retail purchases.
- The average airport customer spends \$11.91 on food and beverage. This figure is higher (\$14.72) for travelers in small airports.

The 2007 North America Airport Satisfaction Study is based on responses from more than 10,200 passengers who took a flight between May 2006 and April 2007. Passengers evaluated up to two different airports—their departing and arriving airport—for a total of more than 17,400 evaluations.

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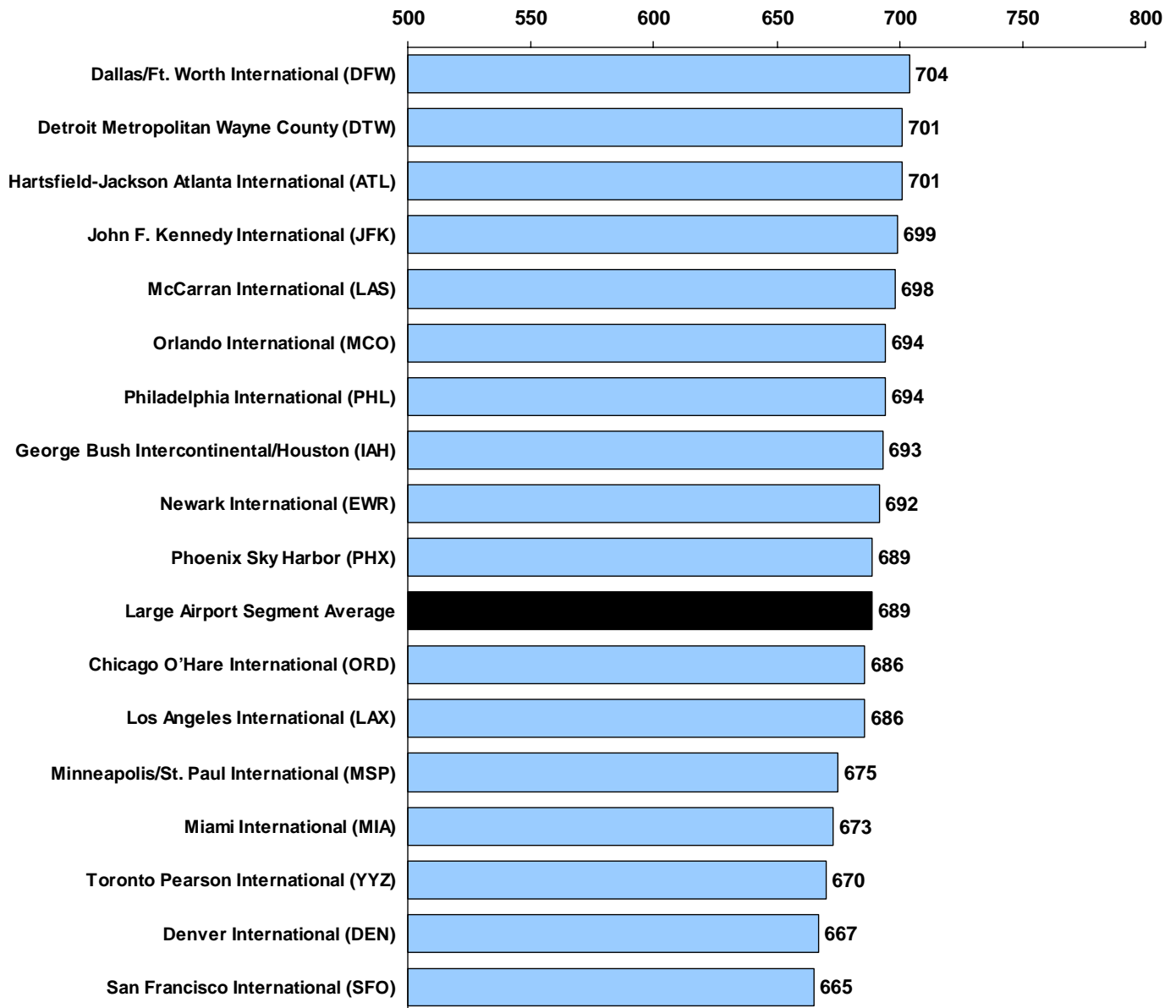
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2007 North America Airport Satisfaction StudySM

Large Airport Ranking

(30 million passengers or more per year)

Overall Airport Satisfaction Index Score
(Based on a 1,000 point scale)



Source: J.D. Power and Associates 2007 North America Airport Satisfaction StudySM

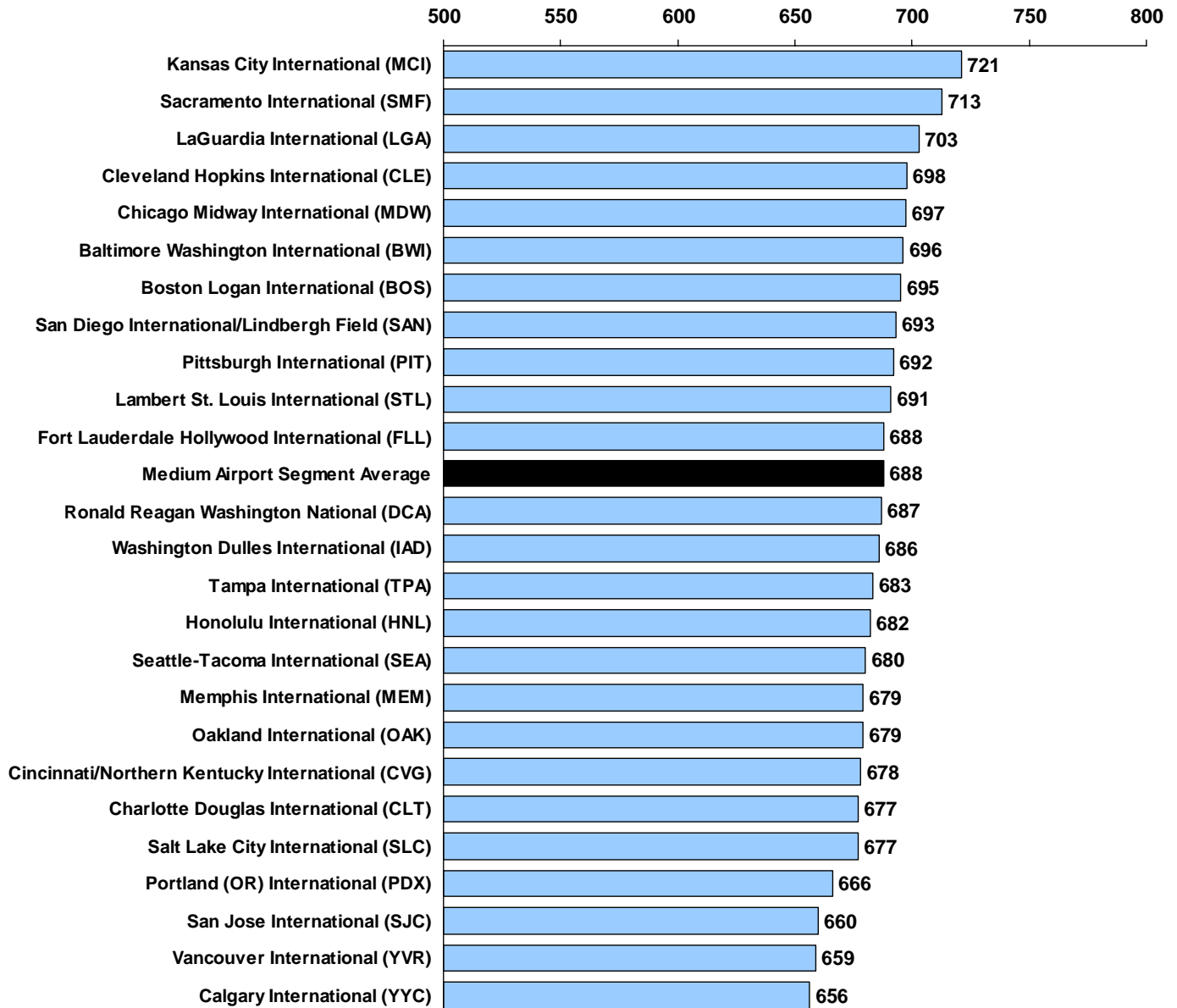
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J.D. Power and Associates 2007 North America Airport Satisfaction StudySM

Medium Airport Ranking

(10 million to fewer than 30 million passengers per year)

Overall Airport Satisfaction Index Score
(Based on a 1,000 point scale)



Included in the study but not ranked due to small sample size is Mexico City Juarez (MEX)

Source: J.D. Power and Associates 2007 North America Airport Satisfaction StudySM

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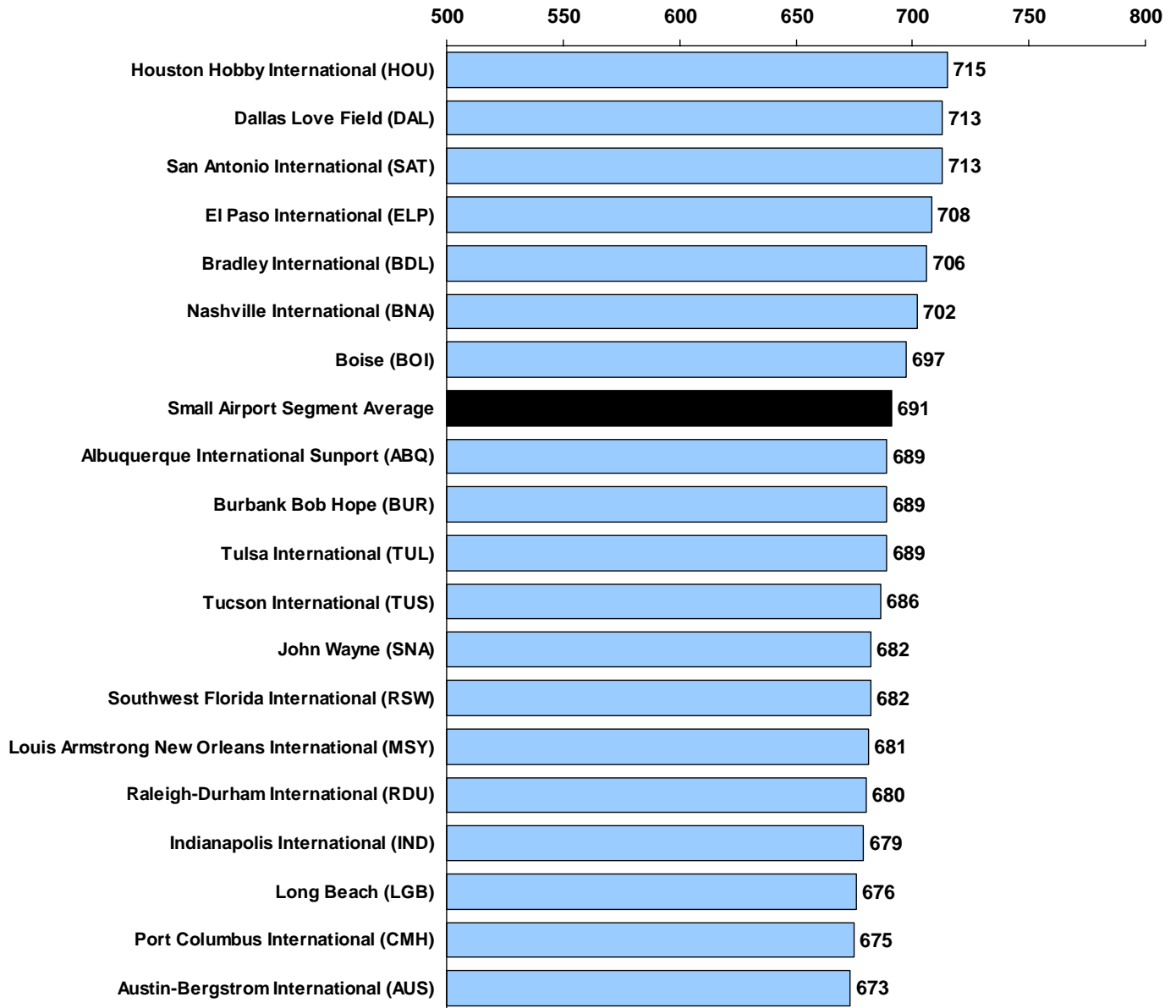
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2007 North America Airport Satisfaction StudySM

Small Airport Ranking

(fewer than 10 million passengers per year)

Overall Airport Satisfaction Index Score
(Based on a 1,000-point scale)



Source: J.D. Power and Associates 2007 North America Airport Satisfaction StudySM

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