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Importance of service quality in air travel for Generation Z Pax: A door-to-door perspective at the case of Switzerland

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Reasons for the study

- **Service quality** has become **more relevant** to the airline industry as competition in this sector has intensified.
- Service quality is an **option to differentiate** from industry competitors and **boost passenger satisfaction.**
- As an air travel service provider it is essential to understand which service quality factors are **most important.**
- Air travel is **intermodal**, however the focus of researchers in the past was mostly only on one section of the air travel service chain.

➢ A **holistic approach** includes upstream and downstream processes, which **influence overall satisfaction of the travel experience.**

The main question

Which aspects of service quality along an air travel door-to-door approach are the most relevant for Generation Z passengers taking a short-haul flight for leisure in the Schengen area in Europe?

Why Gen Z:

They show different travel and behaviour patterns.

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Experimental design

Literature Review

- Attribute determination for Adaptive Choice-Based Conjoint

Selection of attributes

- Clustering attributes
- Consolidation
- Exclusion of some attributes based on qualitative insights

Survey Development

- Building survey in Sawtooth software
- Pre-test of attributes

ACBC (N=112)

- Introduction including demographic questions
- Relevance of attributes
- ACBC (Screening tasks)
- Distributed among Generation Z

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Methodological approach – Online survey including ACBC

Why ACBC?
Advantages of the ACBC Methodology compared to CBC

- k mpc **appealing to participants**
- **improves** af mgac **predictions**
- npmtgbcq **better estimates for small sample sizes** &K aAs jjms ef *0. . 09As I I gl ef _k cr _j,*0. / . 9 Mpk c*0. / . _*0. / 2'
- ? `gjgrwrm **stabilize partial utility estimates** dmp ck _jjcp q_k njc cgxcq
- **More information** gq amjjcarcb _r rf c **individual level**
- F gcp_paf ga_j @_wcq &F @ cqrgk _rgml aml cggrcl rjwnpmtgbcq **more accurate results** rf _l k ml mrml ga pcepcqqgml _l _jwqgq

ACBC Attributes and levels Departure Airport and Flight (1/2)

Category	Attribute	Level
Journey to the airport	*Journey to the airport*	*Public transport* *Ridesharing or taxi* *Own car* *Drop-Off*
Infrastructure at the departure airport (8)	Distance bus/ train stop or parking - airport entrance	Less than 5 minutes 5 to 10 minutes More than 10 minutes
	Luggage trolleys	Available Not available
	Self-check-in	Available Not available
	Signage	Sufficient Not Sufficient
	Distance security - terminal	Less than 10 minutes 10 to 20 minutes More than 20 minutes
	Elevators, escalators, and moving walkways	Available Available
	WiFi/ charging stations	Available Not available
	Aerobridge	Available Not available
	(Duty-free) shops	Available
Offer at the departure airport (5)		Not available
	Restaurants	Available Not available
	ATM/ currency exchange	Available Not available
	Smoking lounge	Available Not available
	Business lounge	Available Not available
Ambiance at the departure airport (7)	Modernity	Modern Not modern
	Comfort at the terminal	Sufficient space & comfort Insufficient space & comfort
	Sound volume/ temperature	Silent & pleasant Noisy, stuffy, too hot or too cold
	Skills and friendliness of staff	distinctive skills, excellent behavior insufficient skills, unfriendly behavior
	Cleanliness	Clean Dirty
	Waiting times at check-in	Less than 12 minutes 12 to 25 minutes More than 25 minutes
	Waiting times for security check	Less than 12 minutes 12 to 25 minutes More than 25 minutes
Flight (8)	Modernity	Modern Not modern
	Temperature and fresh air	Pleasant Stuffy, too hot, or too cold
	Sound volume	Silent Noisy
	Comfort and legroom	Comfortable, enough space Uncomfortable and narrow
	Cleanliness	Clean Dirty
	Skills and friendliness of staff	distinctive skills, excellent behavior insufficient skills, unfriendly behavior
	Meals	Possible Not possible
	On-board entertainment	Available Not available

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ACBC Attributes and levels Arrival Airport (2/2)

Infrastructure at the arrival airport (7)	Aerobridge	Available Not available
	WiFi/ charging stations	Available Not available
	Signage	Sufficient Not Sufficient
	Distance terminal - exit	Less than 10 minutes 10 to 20 minutes More than 20 minutes
	Elevators, escalators, and moving walkways	Available Available
	Luggage trolleys	Available Not available
	Distance exit - bus/ train stop, pick-up, or rental car collection	Less than 5 minutes 5 to 10 minutes More than 10 minutes
Offer at the arrival airport (4)	(Duty-free) shops	Available Not available
	Restaurants	Available Not available
	ATM/ currency exchange	Available Not available
	Smoking lounge	Available Not available

Demographic data of ACBC sample

Variable	Value	Percentage (Absolute)
Gender (n=112)	Male	38% (42)
	Female	62% (69)
	Prefer not to answer	1% (1)
Birth year (n=112)	1995 - 1997	55% (62)
	1998-2000	33% (37)
	2001-2003	8% (9)
	2004-2006	4% (4)
Frequency of short-haul air travel in the last 24 months (N=112)	Less than once a year, but at least once in the past 24 month	24% (27)
	At least once a year	29% (33)
	Two to three times a year	23% (26)
	Four to six times a year	13% (14)
	More than six times a year	11% (12)
Highest level of education attained (N=112)	Lower secondary school	3% (3)
	Upper secondary education	27% (30)
	Bachelor's degree	48% (54)
	Master's degree	22% (25)
	Doctorate	0% (0)
Place of residence (N=112)	City	49% (55)
	Intermediate location	29% (32)
	Rural area	22% (25)

Gen. Z

ACBC Findings – Departure Airport

Category	Attribute	Average Importance	Standard Deviation
Infrastructure at the departure airport (8)	Signage	41.87%	27.96%
	Distance security - terminal	16.26%	25.40%
	Elevators, escalators, and moving walkways	11.81%	21.46%
	Distance stop or parking - airport entrance	8.71%	16.79%
	Self-check-in	8.29%	11.56%
	WiFi/ charging stations	7.99%	12.66%
	Aerobridge	5.01%	12.53%
	Luggage trolleys	0.05%	0.54%
Offer at the departure airport (5)	Restaurants	49.74%	18.00%
	(Duty-free) shops	27.94%	19.81%
	ATM/ currency exchange	12.35%	17.98%
	Smoking lounge	7.37%	20.20%
	Business lounge	2.59%	9.35%
Ambiance at the departure airport (7)	Waiting times for security check	29.63%	21.56%
	Cleanliness	24.95%	22.52%
	Waiting times at check-in	17.91%	16.13%
	Skills and friendliness of staff	10.25%	14.92%
	Comfort at the terminal	8.67%	13.27%
	Sound volume/ temperature	7.54%	15.63%
	Modernity	1.04%	3.93%

Infrastructure

→ **Sinage is most imporatant but less critical for Frequent flyers.**

Offer

→ Offer at the departure airport is among **least relevant aspects of an air travel journey**

→ Preference **to dine in a restaurant** rather than purchasing takeaway items from a shop.

Ambiance

→ **Waiting times at the airport enhance a stressful flight experience.**

→ **Frequent travellers** prioritized **waiting times** among their **top three considerations**

ACBC Findings – Flight

Category	Attribute	Average Importance	Standard Deviation
Flight (8)	Cleanliness	34.22%	24.32%
	Comfort and legroom	23.68%	21.89%
	Temperature and fresh air	16.97%	17.97%
	Skills and friendliness of staff	11.33%	16.09%
	Meals	5.93%	10.01%
	Sound volume	3.63%	10.08%
	Modernity	2.26%	6.89%
	On-board entertainment	1.99%	6.90%

- → **The flight is an important step on the air travel journey** (109 out of 112 selcted it for ACBC)
- → **Well-being factors carry significant importance.** Factors which cannot be outsourced (as cleanliness, comfort or temperature) are important.
- → **Men** declare **legroom** as more relevant.
- → **Women** rated the **friendliness** and **competence** of the crew as more critical.

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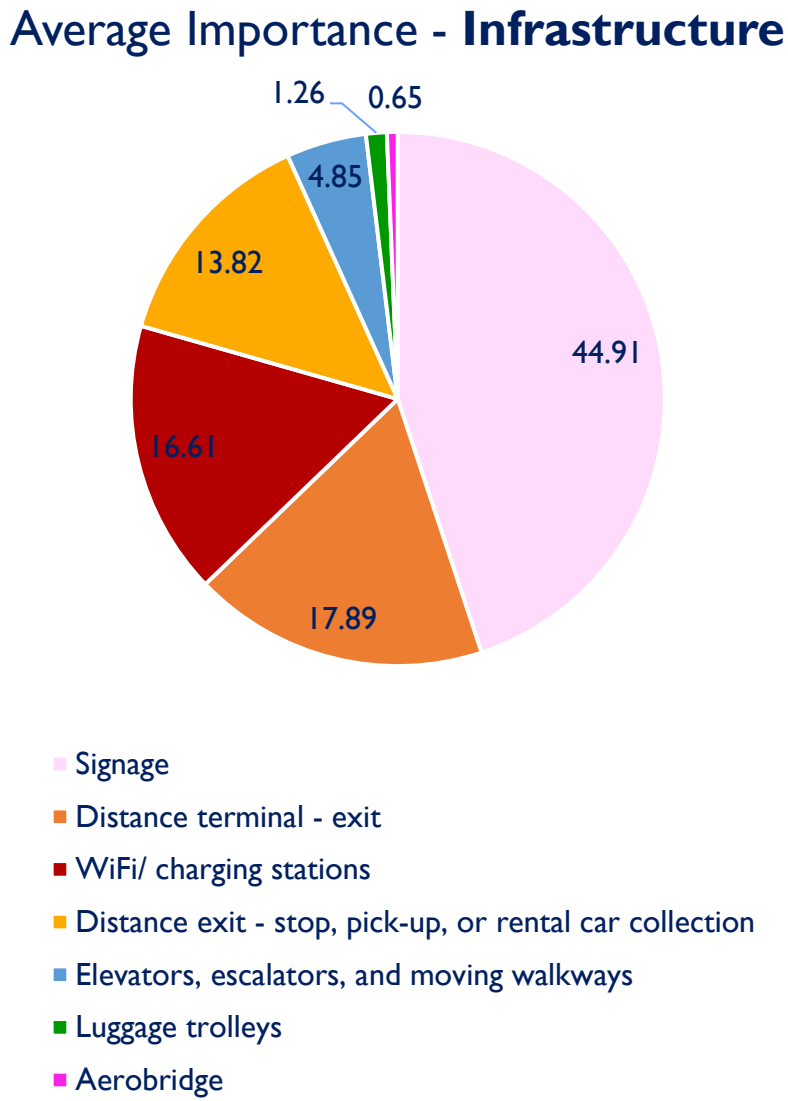
ACBC Findings – Infrastructure at the Arrival Airport



→Signage emerged as the most critical attribute

→Distances matter

→WiFi and charging stations are more relevant than at the departure airport

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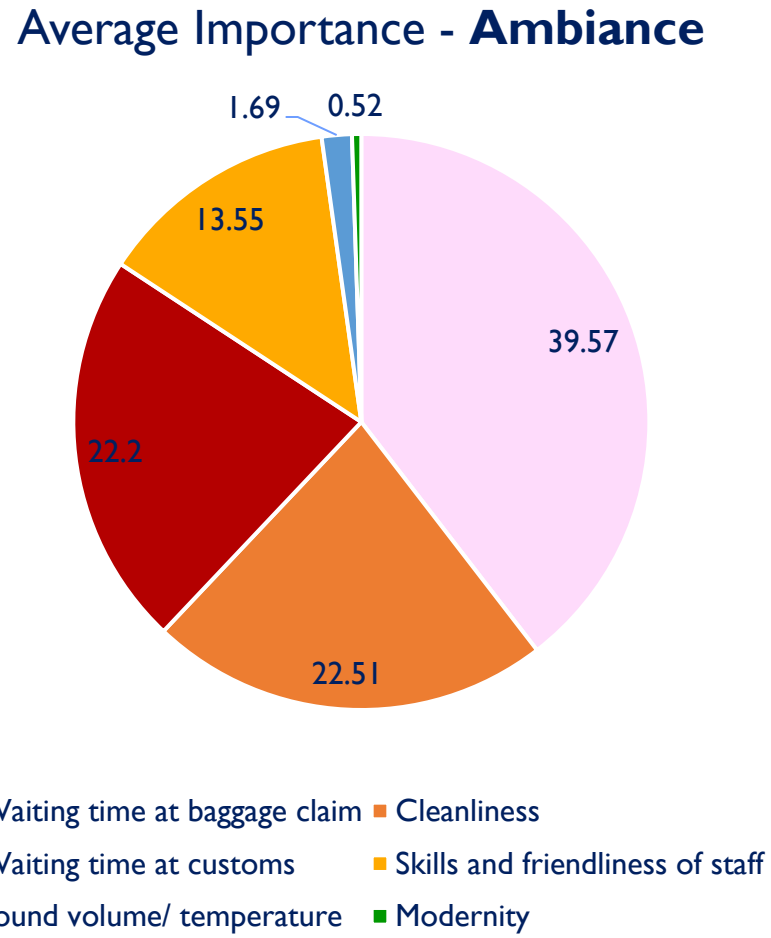
ACBC Findings – Ambiance at the Arrival Airport*



→Waiting for baggage claim and customes are key.

→Cleanliness is relevant.

* Offer was ranked: Restaurants (37%), ATM/ currency exchange (31%), (duty-free) shops (22%), smoking lounge (19%). It is not included in the presentation, since in only 41% of the cases it was included in the ACBC and it seems as the relevance of the offer at the arrival airport is among the lowest.

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Take-aways

Generation Z in Switzerland has the following preferences along their travel journey (door-to-door):

- The flight is the core product of an air travel journey and most important
  → Cleanliness, comfort and legroom, temperature and fresh air, and skills and friendliness of staff were rated the highest and airlines
- Signage and distances at both airports are essential factors
- Restaurants are the most important offering at both airports
- Waiting times at check-in, security, baggage claim, and customs are important.
- Cleanliness and the skills and friendliness of the staff are crucial at both airports is relevant.

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Thank you!

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