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1 Net Promoter US Consumer Study 2014 Overview

Net Promoter is both a loyalty metric and a discipline for using customer feedback to fuel profitable growth. Developed by Satmetrix, Bain & Company, and Fred Reichheld, the concept was first popularized through Reichheld’s book The Ultimate Question, and has since been embraced by leading companies worldwide as the standard for measuring and improving customer loyalty.

The Net Promoter Score, or NPS®, is a loyalty metric that is calculated by placing a company’s customers into three categories: Promoters, Passives, and Detractors. Customers are asked one key loyalty question: How likely is it that you would recommend [Company X or Brand X] to a friend or colleague? Customers respond on a 0-to-10 point rating scale, with 0 being not at all likely, and 10 being extremely likely to recommend. Responses are categorized as follows:

- Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.
- Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.
- Detractors (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

To calculate a company’s Net Promoter Score, take the percentage of customers who are Promoters and subtract the percentage who are Detractors. The resulting NPS can provide insight on competitive position among companies in a given industry. By understanding attributes of the customer experience that influence the recommend score and NPS, companies can make improvements to product and service design and delivery to support profitable growth.

1.1 About the 2014 Satmetrix Net Promoter Benchmarks

The Net Promoter Benchmarks are compiled by Satmetrix, the co-developer of Net Promoter, to help companies compare their Net Promoter Score performance to other leading brands. The business-to-consumer benchmarks rate leading consumer brands across a variety of industry sectors and countries.

Data for the 2014 US consumer benchmark was collected in January 2014 using an opt-in email survey with more than 24,000 individuals in the United States across more than 200 brands in 22 industry sectors. The database includes brands for which 100 or more responses were received regarding the company’s products and/or services. This tends to capture the largest companies operating in the market, but is subject to some variability based on the respondent sample.

In addition to this report, the respondent-level data underlying the findings and statistics can also be purchased from Satmetrix.

For more information on Net Promoter and the data collection methodology, refer to the Appendix.
2 The US 2014 Airlines Consumer Benchmark

2.1 Net Promoter® Scores

The 2014 US Consumer Airlines study, features ratings for 10 different companies, from 2,362 US consumers. Below are the Net Promoter® scores for each brand covered. Each brand's score is plotted as a red dot. The standard error of the NPS® statistic is plotted as horizontal bars either side of the score. Scores are sorted highest to lowest.
2.2 Net Promoter® Category Breakdown

The following figure breaks down the proportion of respondents categorized as *Promoters, Passives, or Detractors* for each brand.

![Net Promoter® Category Breakdown Chart](chart.png)

2.3 Response Counts

The table below contains the total number of responses for each brand, and their distribution across the different Net Promoter® categories.

<table>
<thead>
<tr>
<th>Company</th>
<th>Detractor</th>
<th>Passive</th>
<th>Promoter</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Southwest</td>
<td>25</td>
<td>64</td>
<td>214</td>
<td>303</td>
</tr>
<tr>
<td>Jet Blue</td>
<td>29</td>
<td>73</td>
<td>198</td>
<td>300</td>
</tr>
<tr>
<td>Virgin America</td>
<td>20</td>
<td>40</td>
<td>95</td>
<td>155</td>
</tr>
<tr>
<td>Alaska</td>
<td>33</td>
<td>92</td>
<td>175</td>
<td>300</td>
</tr>
<tr>
<td>Delta</td>
<td>69</td>
<td>100</td>
<td>133</td>
<td>302</td>
</tr>
<tr>
<td>AirTran</td>
<td>64</td>
<td>115</td>
<td>121</td>
<td>300</td>
</tr>
<tr>
<td>Continental</td>
<td>74</td>
<td>102</td>
<td>124</td>
<td>300</td>
</tr>
<tr>
<td>United</td>
<td>80</td>
<td>110</td>
<td>110</td>
<td>300</td>
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<tr>
<td>American</td>
<td>99</td>
<td>99</td>
<td>107</td>
<td>305</td>
</tr>
<tr>
<td>US Airways</td>
<td>110</td>
<td>107</td>
<td>86</td>
<td>303</td>
</tr>
</tbody>
</table>
3  Year on Year Changes in Net Promoter® Score

3.1  2014 Vs. 2013 NPS®

The Airlines sector has been a part of the Satmetrix annual US consumer benchmark study since 2010. The following chart shows how the scores of the covered brands have changed since the 2013 study. Standard errors around the scores are displayed at horizontal lines.
### 3.2 Significance Testing Changes since 2013

The following chart displays the annual NPS® changes for the brands covered, ordered by the size of the difference. The colour of the dots indicates levels of statistical significance; how likely it is that NPS® changes in our sample reflect changes we would see if it was possible to interview a brand’s entire customer base.
3.3 Trends over time

The following array shows an NPS trend chart for the brands tracked in the Airlines sector, ordered from highest to lowest NPS for 2014. Each chart displays the year on the x (horizontal) axis, and NPS on the y (vertical) axis. The year-on-year trend for each brand is in black. The trendlines for all the brands in the study is shown in the background in grey, for context. Year-on-year changes which are significant (>90% confidence) are indicated with a black dot. Multi-year trends can be significant without each annual score difference being significant (e.g. a general upwards trend over four years).
3 Interpreting the Information in your Report

The following section provides a statistical profile of the brands covered in this study, with a double page spread on each. In addition to Likelihood to Recommend and NPS®, this study compares companies’ performance on various “drivers,” or attributes of the customer experience that may influence customers’ loyalty. Consumers rated their satisfaction with each attribute on a 0 to 10 scale when responding to the benchmark survey. A company’s performance on a particular driver is summarised as the average satisfaction score given. The information on each brand is organised into three sections.

1 NPS®
2 Analysis of Relationship Drivers
3 Analysis of Industry Drivers

NPS®
The upper pane provides information on each company’s NPS®, their breakdown by the Net Promoter categories, and their Likelihood to Recommend distribution. Also provided are some key demographics of the sample; Age, Income and Tenure.

Analysis of Relationship Drivers
Relationship drivers are questions which are asked across all industries in the Satmetrix Consumer Benchmark studies, and pertain to a customer’s overall relationship with a brand, and brand-perceptions based upon their experiences.

Analysis of Industry Drivers
These are industry-specific drivers, which are tailored to each of the 22 sectors covered in the Satmetrix 2014 US consumer research. These measure customers satisfaction with specific aspects of a product or service within a vertical.
Competitive Performance: Dotplots

Dot plots can be used to compare a company’s performance against their competitors in the benchmark, for different drivers. A company’s average satisfaction score is represented as a blue dot, while the Sector average, best, and worst scores in the benchmark are represented in gray. In the example to the left for Southwest Airlines, we can see that they score very highly relative to the other Airlines on many aspects. The exception is the quality of In Flight Entertainment, where they score below average.

Importance Vs. Performance: Quadrant Plots
While average scores give a good idea of a company’s performance on different loyalty drivers, it’s also worth taking into consideration each driver’s importance. By importance, here we mean its likely effect on a customer’s Likelihood to Recommend that brand. Important drivers have a stronger association with Likelihood to Recommend; improvements to these aspects are likely to have a greater impact on loyalty than improvements to less important aspects. The importance statistic used here is the correlation (Pearson’s r) of each driver with Likelihood to Recommend.

Looking at the performance and importance of drivers simultaneously can help you understand how each driver is affecting loyalty. The midpoints of the performance and importance statistics are indicated with gray lines, dividing the plot area into quadrants, segmenting drivers into categories which are likely to have differential effects on the customer experience. In the Southwest Airlines example to the left, we can see that although they scored low relative to the competition for In Flight Entertainment, for Southwest customers, this is one of the least important aspects of their relationship. We can also see a broadly positive relationship between performance and importance; in general Southwest’s perceived strengths are the more important aspects to its customers. One final dimension added to these charts is the size of the bubble, representing the proportion of customers who responded to the question. A bubble smaller than the others on the chart indicates a larger proportion of ‘Not applicable’ answers - a driver which not all customers have experience of.
Satmetrix Data Products: Net Promoter® Benchmarks

1st: Southwest

Promoter 71%  Passive 21%  Detractor 8%

Competitive Performance: Relationship Drivers

- Online Experience
- Ease of Doing Business
- Buying/Sign-up Experience
- Company Reputation
- Customer Service Experience
- Treats customers fairly
- Product or Service Reliability
- Product or Service Features
- Overall Value for Money

Mean Satisfaction Score

7.0 7.5 8.0 8.5

Competitive Performance: Industry Drivers

- Attitude & Friendliness of Cabin Staff
- Efficiency & Attention of Cabin Staff
- Check In Process
- Ease of Booking Baggage and Extras
- Food & Drink Quality
- In Flight Entertainment Quality
- Seat Comfort

Mean Satisfaction Score

6.5 7.0 7.5 8.0 8.5

Company Score

Worst in Sector  Sector Average  Best in Sector
Importance-Performance Plots: Relationship Drivers

Importance-Performance Plots: Industry Drivers
2nd: Jet Blue

Satmetrix Data Products: Net Promoter® Benchmarks

Promoter 66%
Passive 24%
Detractor 10%

Competitive Performance: Relationship Drivers

Competitive Performance: Industry Drivers
Average Age: 45
Average Income: $84.4k
Average Years of Custom: 4.5

Importance-Performance Plots: Relationship Drivers

- Company Reputation
- Product or Service Features
- Product or Service Reliability
- Customer Service Experience
- Treats customers fairly
- Ease of Doing Business
- Online Experience
- Overall Value for Money
- Buying/Sign-up Experience

Importance-Performance Plots: Industry Drivers

- Check In Process
- Attitude & Friendliness of Cabin Staff
- Efficiency & Attention of Cabin Staff
- Ease of Booking Baggage and Extras
- Seat Comfort
- Food & Drink Quality
- In Flight Entertainment Quality
3rd: Virgin America

Promoter: 61%
Passive: 26%
Detractor: 13%

Competitive Performance: Relationship Drivers

<table>
<thead>
<tr>
<th>Driver</th>
<th>Mean Satisfaction Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall Value for Money</td>
<td>7.0</td>
</tr>
<tr>
<td>Product or Service Features</td>
<td>8.0</td>
</tr>
<tr>
<td>Product or Service Reliability</td>
<td>8.5</td>
</tr>
<tr>
<td>Treats customers fairly</td>
<td>8.0</td>
</tr>
<tr>
<td>Customer Service Experience</td>
<td>8.5</td>
</tr>
<tr>
<td>Company Reputation</td>
<td>8.5</td>
</tr>
<tr>
<td>Buying/Sign-up Experience</td>
<td>8.0</td>
</tr>
<tr>
<td>Company Reputation</td>
<td>8.5</td>
</tr>
<tr>
<td>Customer Service Experience</td>
<td>8.5</td>
</tr>
<tr>
<td>Treats customers fairly</td>
<td>8.0</td>
</tr>
<tr>
<td>Product or Service Features</td>
<td>8.5</td>
</tr>
<tr>
<td>Product or Service Features</td>
<td>8.5</td>
</tr>
<tr>
<td>Overall Value for Money</td>
<td>8.0</td>
</tr>
</tbody>
</table>

Competitive Performance: Industry Drivers

<table>
<thead>
<tr>
<th>Driver</th>
<th>Mean Satisfaction Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seat Comfort</td>
<td>6.5</td>
</tr>
<tr>
<td>In Flight Entertainment Quality</td>
<td>7.0</td>
</tr>
<tr>
<td>Food &amp; Drink Quality</td>
<td>7.0</td>
</tr>
<tr>
<td>Ease of Booking Baggage and Extras</td>
<td>7.0</td>
</tr>
<tr>
<td>Check In Process</td>
<td>7.5</td>
</tr>
<tr>
<td>Efficiency &amp; Attention of Cabin Staff</td>
<td>7.0</td>
</tr>
<tr>
<td>Attitude &amp; Friendliness of Cabin Staff</td>
<td>8.0</td>
</tr>
<tr>
<td>Company Score</td>
<td>8.0</td>
</tr>
<tr>
<td>Worst In Sector</td>
<td>6.5</td>
</tr>
<tr>
<td>Sector Average</td>
<td>7.0</td>
</tr>
<tr>
<td>Best In Sector</td>
<td>8.5</td>
</tr>
</tbody>
</table>
Average Age: 40
Average Income: $83k
Average Years of Custom: 3

Importance-Performance Plots: Relationship Drivers

- a: Product or Service Reliability
- b: Company Reputation
- c: Customer Service Experience
- d: Treats customers fairly
- e: Product or Service Features
- f: Ease of Doing Business
- g: Overall Value for Money
- h: Buying/Sign-up Experience
- i: Online Experience

Importance-Performance Plots: Industry Drivers

- a: Attitude & Friendliness of Cabin Staff
- b: Check In Process
- c: Ease of Booking Baggage and Extras
- d: Efficiency & Attention of Cabin Staff
- e: Food & Drink Quality
- f: Seat Comfort
- g: In Flight Entertainment Quality
4th: Alaska

Promoter 58%
Passive 31%
Detractor 11%

Competitive Performance: Relationship Drivers

Competitive Performance: Industry Drivers
Importance-Performance Plots: Relationship Drivers

<table>
<thead>
<tr>
<th>Customer Service Experience</th>
<th>Company Reputation</th>
<th>Product or Service Reliability</th>
<th>Product or Service Features</th>
<th>Ease of Doing Business</th>
<th>Buying/Sign-up Experience</th>
<th>Treats customers fairly</th>
<th>Online Experience</th>
<th>Overall Value for Money</th>
</tr>
</thead>
</table>

Importance-Performance Plots: Industry Drivers

<table>
<thead>
<tr>
<th>Check In Process</th>
<th>Efficiency &amp; Attention of Cabin Staff</th>
<th>Attitude &amp; Friendliness of Cabin Staff</th>
<th>Ease of Booking Baggage and Extras</th>
<th>Seat Comfort</th>
<th>Food &amp; Drink Quality</th>
<th>In Flight Entertainment Quality</th>
</tr>
</thead>
</table>
5th: Delta

Promoter: 44%
Passive: 33%
Detractor: 23%

Competitive Performance: Relationship Drivers

Competitive Performance: Industry Drivers
Average Age: 50
Average Income: $73.5k
Average Years of Custom: 5.5

Importance-Performance Plots: Relationship Drivers

Importance-Performance Plots: Industry Drivers
6th: AirTran

Promoter: 40%
Passive: 38%
Detractor: 21%

Competitive Performance: Relationship Drivers

Mean Satisfaction Score

Competitive Performance: Industry Drivers

Mean Satisfaction Score
Average Age: 46
Average Income: $87.3k
Average Years of Custom: 4.4

Importance-Performance Plots: Relationship Drivers

Importance-Performance Plots: Industry Drivers
7th: Continental

Promoter: 41%
Passive: 34%
Detractor: 25%

Competitive Performance: Relationship Drivers

Competitive Performance: Industry Drivers
Average Age: 45
Average Income: $92.2k
Average Years of Custom: 5.9

Importance-Performance Plots: Relationship Drivers

Importance-Performance Plots: Industry Drivers
8th: United

Promoter: 37%
Passive: 37%
Detractor: 27%

Competitive Performance: Relationship Drivers

Competitive Performance: Industry Drivers
Average Age: 49
Average Income: $86.1k
Average Years of Custom: 5.8

Importance-Performance Plots: Relationship Drivers

Importance-Performance Plots: Industry Drivers
9th: American

Promoter: 35%
Passive: 32%
Detractor: 32%

Competitive Performance: Relationship Drivers

Mean Satisfaction Score

Competitive Performance: Industry Drivers

Mean Satisfaction Score
Importance-Performance Plots: Relationship Drivers

Importance-Performance Plots: Industry Drivers
10th: US Airways

Promoter: 28%
Passive: 35%
Detractor: 36%

Competitive Performance: Relationship Drivers

Mean Satisfaction Score

Online Experience
Ease of Doing Business
Buying/Sign-up Experience
Company Reputation
Customer Service Experience
Treats customers fairly
Product or Service Features
Product or Service Reliability
Overall Value for Money

Mean Satisfaction Score

7.0 7.5 8.0 8.5

Competitive Performance: Industry Drivers

Mean Satisfaction Score

Attitude & Friendliness of Cabin Staff
Efficiency & Attention of Cabin Staff
Check In Process
Ease of Booking Baggage and Extras
Food & Drink Quality
In Flight Entertainment Quality
Seat Comfort

Mean Satisfaction Score

6.5 7.0 7.5 8.0 8.5

Company Score
Worst In Sector
Sector Average
Best In Sector
Average Age: 51
Average Income: $84.3k
Average Years of Custom: 5.2

Importance-Performance Plots: Relationship Drivers

Importance-Performance Plots: Industry Drivers
5 Appendix

5.1 Data Collection Methodology

The Satmetrix Net Promoter benchmark database is populated with valid, statistically meaningful data that companies can use to compare their performance against others within and across industry sectors. The opt-in email survey uses lists of individuals who had previously indicated interest in participating in similar studies. An email invitation explains the purpose of the survey, offers an incentive to participate, and provides a link that allows individuals to complete the survey online.

All respondents are familiar with the products and services that are the subject of the survey, having indicated that they had significant experience as a personal consumer within the previous year. Participants select the primary brand they do business with in each sector. Respondent screening and qualification is based on two levels of questioning. Examples of the screening questions are shown below:

- Sector experience: "In the past year, which types of products and services within this industry have you frequently used as a personal consumer?" Respondents are presented with a list of sectors within the industry. Respondents who select a sector to move to the final stage of qualification for brands within that sector.

- Primary provider: "Which of the following providers have you had the most experience with as a personal customer/consumer in the past year? If you cannot find your provider, then select 'Other' and enter the company name in the space provided." If a respondent selects one of the brands from our pre-defined list, they qualify.

Results are compiled shortly after each study's completion.

5.2 Data Collection Period

The data for this study was collected in January 2014.

5.3 Internal vs. External Net Promoter Data Collection

There is a difference between internal Net Promoter data (i.e., Net Promoter data collected by a company canvassing its current customer base) and external Net Promoter data (i.e., Net Promoter data collected by a third party using third party respondents). The expected difference results from varying respondent samples.

Internally collected Net Promoter data is generated through a process by which companies measure customer experience with the goal of improving loyalty and Net Promoter Scores. Respondents in the sample come from the company's current customer base. Data, including Net Promoter Scores, are used within the company to understand how teams, regions, products, business units, and market segments are performing, and to drive closed-loop follow up action and customer experience improvements.

External data, as provided in this report, provide a snapshot of each company's market reputation for comparative purposes. Respondents in the sample include consumers who have purchased from the company within the past year, which may include current customers as well as recent customers.

5.4 Netpromoter.com

For more information on the Net Promoter metric and discipline, visit the official website of the Net Promoter Community at www.netpromoter.com. The site also includes information
on community events, training opportunities, and other new developments for companies using Net Promoter.

5.5 About Satmetrix

Satmetrix is the leading provider of cloud-based customer experience software for companies worldwide. As co-developer of the industry-leading Net Promoter® methodology, its applications deliver full process support to help companies reduce customer churn, mobilize loyal promoters, generate more powerful insights and drive customer obsession through accountability. With experience on more than 700 deployments in 40 languages, Satmetrix has the knowledge to accelerate the success of customer experience efforts using Net Promoter. For more information, visit www.satmetrix.com, or call us at 1.888.800.2313 in North America, or +44.845.371.1040 in the UK and Europe.
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INFO@SATMETRIX.COM  +44 (0) 845.371.1040  SATMETRIX.COM