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## **Comparative Study of Low Cost Airlines *vis-a-vis* Full Service Carriers: A Customer's Service Perspective**

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### **Abstract**

*The scope of services in airline industry is constantly expanding and services are gaining a peculiarity in the industry. This paper is a comparison of low-cost carrier which has lower fares and fewer comforts and full service carrier offers the full range of services to their passengers.*

*It explores the perceptions of the passengers choosing between low cost carriers and full service airlines. It also depicts the facets of the sensitivity of a passenger to a change in fare and which flight products would persuade them to select either a full service airline or a low cost carrier.*

*The study finds that there is a homogenous set of flight products required by leisure passengers, travelling on both full service and low cost airlines, however there is a significant dissimilarity overall between the necessities of passengers using a full service airline and a low cost carriers .*

**Keywords:** Airline industry, Service, Low cost carriers, Full service airlines Passengers, Flight products.

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### **Introduction**

The present study is based on the airline passenger's perception about Low Cost Airlines and Full service carriers in the airline industry. This has been growing in interest because the delivery of high services is necessary for airlines' survival and competitiveness. Today, India is turned out to be one of the fastest growing aviation sectors in the world. With the liberalization of the Indian aviation sector, the aviation industry has gone through a tremendous structural change. It has experienced incredible improvement not only in passenger and cargo traffic but also in the number of aircrafts and airlines. From being primarily dominated by government-owned airlines, Air India and Indian Airlines, it is now dominated by private airlines, both full-service carriers and low-cost or no-frills carriers. Now, private airlines control around 75 per cent share of the domestic aviation industry.

The lower air fares as a result of increased competition have made air travel accessible to a large number of people which has fueled the growth of the aviation sector in India. As airfares drop, an increasing number of middle-income travelers prefer to travel by air. In fact, domestic air travel has grown at the rate of around 38 per cent in the period Jan – July 2007. However, study of the air passenger's perception for low cost airlines and full service carrier has been limited.

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This research paper focuses on the relationship, between customer's sensitivity to select the low cost airlines and full service carriers. The ultimate aim of the research is to obtain insights into the perceptions of passengers to a change in fare between low cost carriers and full service airlines, while determining which flight products are most important to passengers travelling on each type of carrier.

The study finds that there were significant differences between airlines passenger's perception for selecting the low cost carrier and full service carriers as both have their own significances and drawbacks

### **Literature Review**

The paper investigates those elements that distinguish Low Cost Carriers (LCC) with the Full Service Carriers (FCC) is its low unit operating costs and its low average price in the market it serves. (Reynolds-Feighan A., 2001). The growth of low cost carriers has shown that they can profitably compete with full-service carriers, mainly in the price-sensitive leisure market, on these variables (Fourie and Lubbe, 2006). As the number of low cost carriers has grown, these airlines have begun to compete with one another in addition to the full service airlines. In these challenging circumstances, a comparative study on the similarities as well as differences between low cost carriers and full service airlines is apparently pertinent and crucial. Airline services in spite of whether they are full service or low cost carriers are made up of a very complex mix of intangibles (Gursoy *et al.*, 2005).

The Indian air transport sector is among the most vibrant and fastest growing in the world. As per IATA forecasts, with GDP growth of 7.2% for 2005 to 2009, air traffic growth can be expected to be in the 15% range (Bisignani 2005). With less than 1% of its population currently traveling by air, India's growth potential is enormous. Within a period of 15 years, the number of Indian carriers has grown from 2 players to more than 10 today. More than 24.85 million passengers travelled between January and July 2007 as against 18.03 million in the same period last year (Awasthi, 2007). Passengers expect airlines to ensure safe journey, support in mitigating problems due to critical incidents and of course meet time commitments.

### **Low-cost Carriers/No-frills Airline and Full Service Airlines: Some Insights**

The first LCC in India was launched in Aug 2003. After that many other LCC have already been launched in India and many are waiting for approval to be launched in the next few years. As Low cost airlines operate mostly on a point-to-point basis only, they will be not responsible if any passengers fail to make their connections, even if the onward journey is with the same carrier. The risk of failing to make a connection involves the traveller purchasing another ticket. Data from the previous surveys indicates that passengers are willing to accept that risk. This is a common belief that low cost airlines tickets are available at a cheap cost, where as full service airline tickets are expensive than LCC.

The main reasons for this are that the low cost airlines in India employ that their pricing strategy that their fares are marginally higher than the railways first and second class fares and lower than the scheduled carriers. Earlier some airlines like Air Deccan were selling tickets starting from Re.1. Full-service flights offer economy class and the costlier business or first class and provide special meals and extra leg room for passengers travelling in the latter category. In addition; passengers using full service airlines are fretful about price but can endure a higher fare in order to get benefit through the additional airline products offered by full service carriers. It is perceptible that passengers travelling on Full service carrier's are strongly emphasizing on reliability, quality, flight schedules, connections, frequent flyer programmes and comfort, while travellers taking low cost carriers focus almost exclusively on fare. A majority of

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people feels that the low cost carriers provide good connectivity. In reality, these low cost airlines connect a little more than 60 cities within the country.

**Civil Aviation in India**

The Indian civil Aviation industry is traced back to 1912, when the first air flight between Karachi and Delhi was started by the Indian State Air Services in collaboration with the UK based Imperial Airways. In 1932, JRD founded Tata Airline, the first Indian airline. India is one of the fastest growing aviation markets in the world. The Directorate General of Civil Aviation (DGCA) controlled every aspect of aviation, including granting flying licenses, pilots, certifying aircrafts for flights and issuing all rules and procedures governing Indian airports and air services. The Airport Authority of India (AAI) was assigned the responsibility of managing all national and international airports and administering every aspect of air transport operation through Air Traffic Control. In the early 1990s, when the Indian Government had opened its domestic air market for private carriers, Air Sahara started its operations as Sahara Airlines with only two aircrafts. Many others such as ModiLuft, East West, and Damania Airlines also commenced their operations but soon wound up. Only Air Sahara remained and spread its operations in the domestic as well as the international market.

The aviation industry comprises of three types of players:

- Full Cost Carriers
- Low Cost Carriers
- Other Start-up airlines

There are some leading players which include Air India, Indian Airlines, Jet Airways, Sahara Airlines, Kingfisher, Spice jet, Paramount, Indigo and Go Air. The Indian air transport sector is among the most vivacious and fastest growing in the world. As per IATA forecasts, with GDP growth of 7.2% for 2005 to 2009, air traffic growth can be anticipated to be in the 15% range (Bisignani 2005). With less than 1% of its population currently traveling by air, India's growth potential is enormous. Within a period of 15 years, the number of Indian carriers have grown

**Table 1: List of Airlines**

AIRLINE	CALLSIGN	COMMENCED OPERATIONS	Headquarters
Jet Airways	JET AIRWAYS	May 1993	Mumbai
JetLite	LITE JET	1991 (As Air Sahara)	Mumbai
Kingfisher Airlines	KINGFISHER	May 2005	Mumbai
Kingfisher Red	KINGFISHER	August 2003 (As Air Deccan)	Mumbai
Air India	AIRINDIA	October 1932	Mumbai
Air India Express	EXPRESS INDIA	April 2005	Mumbai
Air India Regional	ALLIED	1996 (As Alliance Air)	Mumbai
Go Air	GOAIR	June 2004	Mumbai
Indian	INDAIR	May 1953	Mumbai
Spice Jet	SPICEJET	May 2005	Delhi
Jagson Airlines	JAGSON	November 1991	Delhi
IndiGo	IFLY	August 2006	Gurgaon

(Sources: [http://en.wikipedia.org/wiki/List\\_of\\_airlines\\_of\\_India](http://en.wikipedia.org/wiki/List_of_airlines_of_India).)

from 2 players to more than 10 today. More than 24.85 million passengers travelled between January and July 2007. The Civil Aviation Industry is witnessing boom with a host of private airlines taking to the skies.

### **Market Share of Various Domestic Air Carriers in India**

The table no: 2, below has been extracted from the Directorate General Civil Aviation of India (DGCA India) which is attached to the Ministry of Civil Aviation of India. It can be seen in the chart, the market share of the scheduled domestic airlines in India have been compared. The Go Air, Paramount, Spice Jet and kingfisher have managed to capture share in the market i.e. 5.4%, 1.5%, 12.4%, 2.4% respectively. As shown in the figure the low cost carriers have

**Table 2: Market share of Scheduled Domestic Airlines (October 2009)**

<b>Airlines Company</b>	<b>Market Share</b>
Kingfisher	20.7%
Jet Airways	19.8%
NACIL	18.6%
IndiGo	13.6%
Spice jet	12.4%
JetLite	7.9%
Go Air	5.4%
Paramount	1.5%

eaten away one-third of the market share of the full service carriers since their commencement have taken away a large chunk of new travelers.

Source: Directorate General of Civil Aviation (DGCA), Ministry of Civil Aviation

### **Objective of the Study**

1. To study the perception of passengers towards low cost carriers and full service airlines.
2. To study the discernment of the passenger, which type of flight products and services will persuade them to select any of these carriers.

### **Methodology**

The main purpose of this research is to find out the consumer attitude towards the low cost airlines and full service carriers in India to infer the sensitivity of passengers to travel by LCC and FSC. The survey is based on the secondary data and that is collected from various sources that compliment the primary research i.e. questionnaire. Most of the data have collected from the airline websites, and principally from Indian Directorate General of Civil Aviation (DGCA) websites. It is the principal regulatory body in the field of civil aviation in India. It is responsible for formulation and enforcement of civil air regulations, air safety, and air worthiness and coordinates regularity functions with international Civil Aviation organization (ICAO).

### **Questionnaire Design**

In this study the respondents were the passengers who had flown on low cost carriers and full service airlines. The Questionnaires were distributed among passengers waiting in the departure lounges of Low Cost Carrier Terminal (LCCT) and full service airlines terminal at International Dabolim Airport, Goa. A total of 50 questionnaires had being distributed among the passengers

in which only 40 questionnaires were filled up for further analysis. A total of 15 questions were used in the questionnaire to measure passengers' perceptions for both the carriers in this study. The questionnaires were designed with Likert-style rating scale is used in which the respondent is asked how strongly they agree or disagree with a series of statement.

The research would show that LCCs have drawn traffic away from traditional carriers as business travelers attribute less value on the frills of traditional carriers. Again two groups representing customers of LCCs and full-service airlines were interviewed at said airports. The length of the questionnaire was kept short, which would not take more than five minutes for the respondents to fill in. The questionnaires were individually handed over to 40 passengers at Goa airport, 20 passengers for LCC and 20 passengers for FCC. Visitors and passengers were seen waiting at the terminal building were also asked to fill in the questionnaire.

Since this research paper fully focuses on the passenger's perception and sensitivity towards selecting the Full service airline and no-frill airlines, so the passengers travelling by Full service airline and Low cost airline were taken into consideration, it just took 4-5 minutes to get filled up the questionnaire. The passengers were not ready to fill up the initially questionnaire, but somehow it was managed to get done.

Thus for this research, creating an imaginary situation in which respondents do trade-offs between attributes may possibly not have provided an enough differences between the two types of airlines. Since structured questionnaires were used to interview respondents over a restricted time-period, the target was to attain at least 40 responses, 20 travellers using a LCC and 20 business travellers using a full-service airline. The endeavor was to comprise similar sized groups from both types of carrier and to produce results that could be interrelated across two divergent groups. Thus, this target was achieved.

### **Synthesis and Emperical Findings**

According to the survey conducted through questionnaire at Goa Dabolim airport, it was found that the Low cost airlines are not considered on time by the people. A large number of people i.e. 45.10% feel low cost carriers lack on time performance than those of full service airlines i.e.55.20%. As time is very crucial, it is an important element for passengers to select Low Cost airline or Full service airline. The respondents were also asked to indicate the factors of cost of ticket to select the airline.

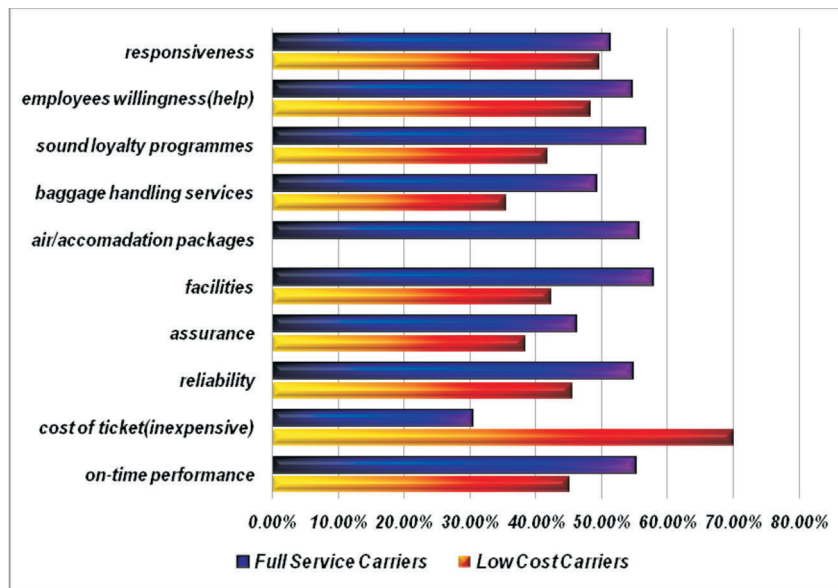
The 70.12% passengers said that Low cost carriers offers more cheaper fares than Full service airlines i.e.30.32%, and it is also a important factor in deciding the mode of transport they would want to travel by. In questionnaire, when respondents were asked about accommodation, once stranded it was known that Low Cost airlines don't provide with any accommodation, in case there is any flight diversion or any contingency, but in case of Full Service airlines they provide it effectively. People perceive the quality of its services to be low. 37.4% of the respondents feel that low cost carriers provide bad quality of service as against 25.4% of the people who feel they provide good quality of service; the rest were neutral.

The research measures and compares differences in passengers' expectations of the desired airline services in terms of the dimensions of reliability; assurance; facilities; employees; flight patterns; customization and responsiveness. It is keenly observed that passengers only prefer low cost carriers for their cheaper fair. In accordance to the respondents it is found that there is no significant difference between the passengers perception for selecting any of these carriers. Primary data were collected from passengers departing from International Dabolim airport. Regarding the service dimension expectations, differences analysis shows that there are no statistically significant differences between passengers who made their own airline choice (decision

makers) and those who did not (non-decision makers).

However, there are significant differences among passengers of different ethnic groups/nationalities as well as among passengers who travel for different purposes, such as business, holiday and visiting friends/relatives. The findings also indicate that passengers consistently rank ‘assurance’ as the most important service dimension. This indicates that passengers are concerned about the safety and security.

The result indicated that, when compared between the two groups of travellers, there was no significant difference in the perceptions of security between travellers who use LCCs and business travellers who use full-service airlines. The majority replied that fare was the most important factor in choosing to fly on a low cost airline. The evidence presented indicates the principle



**Chart 2: Comparative Study of Services Provided by LCC & FCC**

differences in passengers’ perception. Passengers are selecting low cost carriers primarily because of their low fares, while passengers selecting full service airlines opt for them in part because of the additional product services they provide.

An important element of this research was to establish the principal reason why each passenger had selected a particular airline. A study undertaken by Proussaloglou and Koppleman (1995) on the demand for air carrier services concluded that carrier selection was based on a combination of factors that included the airline’s market presence, schedule convenience, low fares, on time performance, reliability and the availability of frequent flier programme. The perception is evident in the Indian market that passengers can use a combination of carrier types to reach their destinations, and that interlining via a low cost carrier network is certainly a workable option.

**Limitations**

The study has measured only the customer perception of LCC & FCC. An inherent limitation of this study is because of its sampling frame. This study considered being small in sample size and it only considers domestic flights i.e. low cost airlines and full service airlines. It should have also underlain the applications and dimensions of international flights. Covering both domestic and international flights will allow stronger generalizations of the results. This study also has

not definitively established causality among the dimensions of sensitivity of passengers for low cost carriers and full service airlines.

### **Discussion of the Result**

This study allows the airline companies to see the expectancy level of customers for the LCC & FCC and service attributes. This study found that the passengers' expectations of the desired airline services is in terms of the proportions of reliability; assurance; facilities; employees; flights patterns; customization and responsiveness had a difference between customers' perception and expected quality of services offered by each airline.

The gap between perceptions and expectations were observed to be highest for Low Cost Carriers than Full service carriers. Overall, reliability of service was an area of concern for passengers across all categories of airlines. The breach between perceptions and expectations were observed to be highest for Low Cost Carriers than Full service carriers. In general, reliability of service was an area of concern for passengers crosswise for all categories of airlines. Airline industry experts believe that there is space for at least five domestic low-cost airlines cost carrier and those on a full service airline, these appears to be a difference in the attitude and perception of passengers from two very different continents.

### **Managerial Implications and Suggestive Outcome**

The findings from this study are measured to be convincing in nature in that they can be used as key into managerial decision-making.:

- ✓ Air fares are the major consents of the passengers of the airlines, in deciding for the mode of transport but safety is also a priority for passengers and should not be compromised in any way. More measures in security and well-trained/vigilant employees will give passengers more confidence.
- ✓ On-time performance should also be considered, as it is another extremely ranked element.
- ✓ The service has to be more prompt and responsive, willing to help and having a courteous attitude must be a priority objective for the employees as part of the service ethnicity.
- ✓ Resources invested in 'Customization' (such as loyalty and frequent flyer programmes) and 'Facilities' (such as in-flight entertainment; waiting lounges and in-flight internet/email/fax/phone services) should be re-examined and embattled to the right audience, as these are the areas that are not normally provided to all passengers in general.
- ✓ There should be provision for the interchangeability between low cost airlines to full fare airlines wherein passenger can change the airline service provider if it is required to do so.

### **Conclusion**

Thus the perception and expectations of the passengers differs from passenger to passenger. Some passenger's are found to be more concerned about the fare, whereas executive class passengers are more concern for safety and services provided by the airline. Also for business passengers the important area of concern while choosing an airline is "on time performance" as these passengers are conscious to reach their destinations on time and to connect their onward journey from other or the same airline.

According to the service attributes defined in the study the safety and facilities are key factors which allow passenger's to select the airline among LCC & FCC. In general, reliability of service was an area of concern for passengers cross-section wise for all categories of airlines.

It is obvious that passengers are travelling on low cost carriers place great importance on price

and show to arrange their itineraries using the least expensive airfares. Thus, most airlines which are timely performed with better quality of services are found to be full cost carriers and the airlines with less fares are known to be low cost carriers.

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**Appendix**

**Questionnaire for Low Cost Carriers**

Please tick the number that indicates the level of importance of each statement for you

Strongly Disagree Neither Agree Agree Strongly  
Agree nor Disagree Agree

- |  |     |     |     |     |     |
|--|-----|-----|-----|-----|-----|
| 1. The Flight departs and arrives at a Time it promises.                                     | 1__ | 2__ | 3__ | 4__ | 5__ |
| 2. The airline provides good in-flight Services constantly.                                  | 1__ | 2__ | 3__ | 4__ | 5__ |
| 3. The airline provides assurance for Service quality  | 1__ | 2__ | 3__ | 4__ | 5__ |
| 4. The airline makes you feel safe.  | 1__ | 2__ | 3__ | 4__ | 5__ |
| 5. Employees of the airlines are Conversant to answer your questions.                        | 1__ | 2__ | 3__ | 4__ | 5__ |
| 6. The aircraft has hygienic and Comfortable Interiors and seats.                            | 1__ | 2__ | 3__ | 4__ | 5__ |
| 7. The airline has up-to-date in-flight Entertainment facilities and programs.               | 1__ | 2__ | 3__ | 4__ | 5__ |
| 8. The airline has comfortable waiting Lounges.  | 1__ | 2__ | 3__ | 4__ | 5__ |
| 9. The airline provides in-flight services.  | 1__ | 2__ | 3__ | 4__ | 5__ |
| 10. Employees of the airline are Courteous with you.   | 1__ | 2__ | 3__ | 4__ | 5__ |
| 11. Employees of the airline appear Neat and tidy.   | 1__ | 2__ | 3__ | 4__ | 5__ |
| 12. The airline has convenient flight Schedules and enough frequencies                       | 1__ | 2__ | 3__ | 4__ | 5__ |
| 13. The airlines has a sound loyalty Program to identify you as a Frequent flyer passenger.. | 1__ | 2__ | 3__ | 4__ | 5__ |
| 14. Employees of the airline give you Prompt Service and are helpful.                        | 1__ | 2__ | 3__ | 4__ | 5__ |
| 15. The airline has well-organized check-in and baggage handling services                    | 1__ | 2__ | 3__ | 4__ | 5__ |

**Questionnaire for Full Service Carriers**

Please tick the number that indicates the level of importance of each statement for you

Strongly Disagree Neither Agree Agree Strongly  
Agree nor Disagree Agree

- |  |     |     |     |     |     |
|--|-----|-----|-----|-----|-----|
| 16. The flight departs and arrives at a time it promises.                                    | 1__ | 2__ | 3__ | 4__ | 5__ |
| 17. The airline provides good in-flight services constantly.                                 | 1__ | 2__ | 3__ | 4__ | 5__ |
| 18. The airline provides assurance for service quality                                       | 1__ | 2__ | 3__ | 4__ | 5__ |
| 19. The airline makes you feel safe.   | 1__ | 2__ | 3__ | 4__ | 5__ |
| 20. Employees of the airlines are conversant to answer your questions.                       | 1__ | 2__ | 3__ | 4__ | 5__ |
| 21. The aircraft has hygienic and Comfortable Interiors and seats.                           | 1__ | 2__ | 3__ | 4__ | 5__ |
| 22. The airline has up-to-date in-flight entertainment facilities and programs.              | 1__ | 2__ | 3__ | 4__ | 5__ |
| 23. The airline has comfortable waiting lounges.   | 1__ | 2__ | 3__ | 4__ | 5__ |
| 24. The airline provides in-flight services.   | 1__ | 2__ | 3__ | 4__ | 5__ |
| 25. Employees of the airline are Courteous with you.   | 1__ | 2__ | 3__ | 4__ | 5__ |
| 26. Employees of the airline appear neat and tidy.   | 1__ | 2__ | 3__ | 4__ | 5__ |
| 27. The airline has convenient flight Schedules and enough frequencies                       | 1__ | 2__ | 3__ | 4__ | 5__ |
| 28. The airlines has a sound loyalty program to identify you as a frequent flyer passenger.. | 1__ | 2__ | 3__ | 4__ | 5__ |
| 29. Employees of the airline give you Prompt Service and are helpful.                        | 1__ | 2__ | 3__ | 4__ | 5__ |
| 30. The airline has well-organized check-in and baggage handling services                    | 1__ | 2__ | 3__ | 4__ | 5__ |