

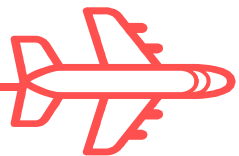
エイビロード  
**AB-ROAD**

**エアライン**

**満足度調査2013**

Market Survey Of Airline Satisfaction

～2012年 海外渡航者によるエアラインの評価～  
ENGLISH VERSION



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# **Part 1: Outline of This Report**



# 1. Outline of the Survey

## ○Objective

Get airline evaluations from those who traveled overseas in 2012.

## ○Respondents

The survey was done on 5,958 respondents selected from the INTAGE Net Monitors of INTAGE Inc. These were Japanese citizens aged 18 years and over who traveled overseas in the year 2012 (the month of departure being in 2012). \* Respondents included also those who traveled for work purposes and those on long-term stays.

## ○Timing

Fri. 19 April through Tue. 23 April, 2013

## ○Research Method

Internet survey

## ○Tabulation Numbers

4,000 respondents (respondents contacted: 5,958, samples collected: 4,187s (successful collection rate of 70.3%))

\* Respondents were randomly selected so that each of 40 airlines was represented by 100 respondents in the numbers tabulated.

### ■Airlines included in the survey

JAL ANA, AirAsia Japan, Peach Aviation, American Airlines, Air Canada, Delta Air Lines, United Airlines, Qantas, Jetstar, Hawaiian Airlines, Asiana Airlines, AirAsia X, Eva Air, Garuda, Cathay Pacific Airways, Jetstar Asia Airways, Singapore Airlines, Thai Airways, Korean Air, Jeju Air, China Airlines, Air China, China Eastern Airlines, Philippines Airlines, Vietnam Airlines, Malaysia Airlines, Alitalia, Virgin Atlantic, Air France, Austrian Airlines, KLM Royal Dutch Airlines, Swiss International Airlines, Lufthansa, Turkish Airlines, Finnair, British Airways, Etihad Airways, Emirates, Qatar Airways

\* **The airlines included in this survey are the top 40 airlines used in the last trip taken in the year 2012, according to the results of the “2013 AB-ROAD Overseas Travel Survey” (see below).**

Addenda:

- (1) In the case of a single answers, totals for the options do not necessarily come out to 100% due to the percentage each option was given being rounded to the second decimal point.
- (2) Figures from a past survey are quoted in order to provide longitudinal data.  
“2012 Airline Satisfaction Survey” - Timing: 20 April through 24 April 2012; Sample size tabulated: 4,000s (100 samples for each airline)
- (3) In this survey, respondents who in 2012 took multiple trips on the airlines covered were asked to answer about their last airline used in order to have them specify the details of the trip taken.
- (4) Omitted from the tabulations of this survey were airlines for which users of “in-flight food and drink service” and “in-flight entertainment” numbered less than 80.

## "2013 AB-ROAD Overseas Travel Survey" Outline

### ○Objective

To provide related parties with reference data by ascertaining the facts regarding overseas travelers' booking practices, consumer behavior, popular destinations, and destinations desired for visit.

### ○Respondents

Selected from the INTAGE Net Monitors of INTAGE Inc., these were Japanese citizens aged 18 years and over who traveled overseas in the year 2012 (the month of departure being in 2012).

### ○Timing

Mon. 25 Mar. through Mon. Apr. 1, 2013

### ○Research Method

Internet survey

### ○Numbers Tabulated

5,077 respondents (respondents contacted: 7,862; samples collected:5,193 (successful collection rate of :66.1%))

### ○Method of Tabulation

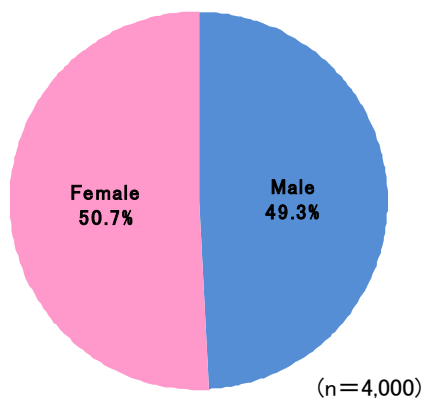
The survey results were weighted to correspond with the breakdown of leisure travelers (by gender and age).

The weightings used are as follows.

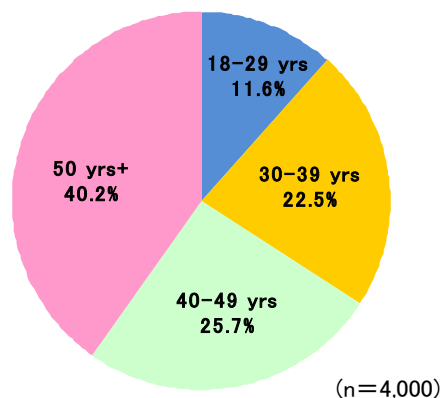
Male				Female			
18-29 yrs	30-39 yrs	40-49 yrs	50 yrs+	18-29 yrs	30-39 yrs	40-49 yrs	50 yrs+
0.572	0.799	0.930	1.711	1.023	0.838	0.661	1.438

## 2. Profile of the Respondents

■ Gender (Total / Single Answer)



■ Age (Total / Single Answer)



■ Area of Residence (Total / Single Answer)

	Sample	Hokkaido	Tohoku	Kanto Total	Kita Kanto	4 prefectures	Hokuriku/ Koshinetsu	Chubu/ Tokai	Kansai Total	Keihanshin	Other Kinki	Chugoku	Shikoku	Kyushu/ Okinawa
Total	4,000	2.4	2.4	49.7	3.1	46.6	3.5	11.2	22.8	19.5	3.3	2.8	1.1	4.3

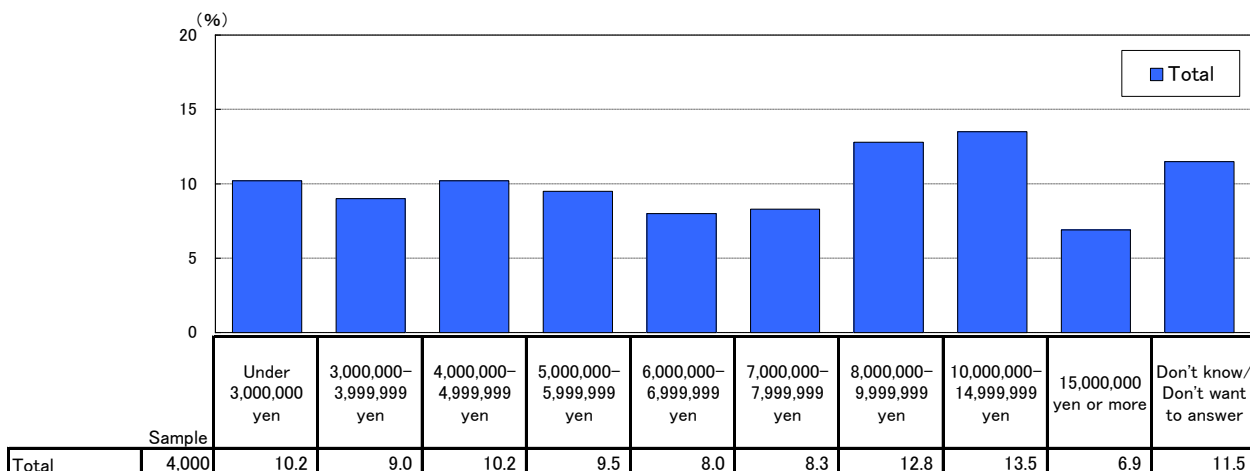
(%)

■ Occupation (Total / Single Answer)

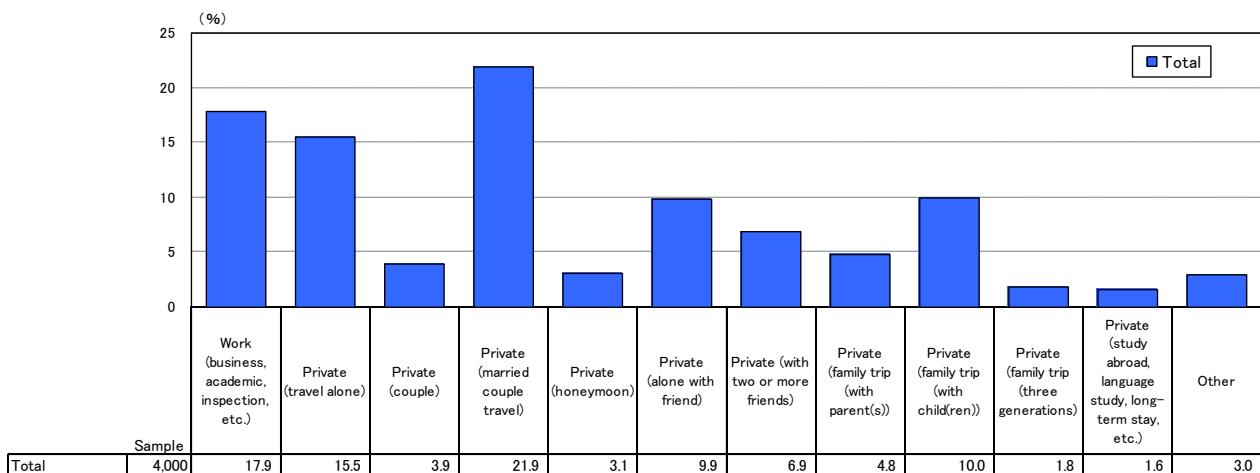
	Sample	Office workers					Civil servants/ Educators	Self-employed	Freelance	Temporary worker/ Contracted employee	Part-timers	Students	Full-time housewives	Unemployed	Other
		Office workers/ General (clerical)	Office workers/ General (research or technical)	Office workers/ General (sales)	Office workers/ General (others)	Office workers/ Manager class, company directors									
Total	4,000	15.3	10.4	4.6	3.8	11.6	5.2	6.0	2.9	3.7	7.8	2.7	15.1	9.4	1.7

(%)

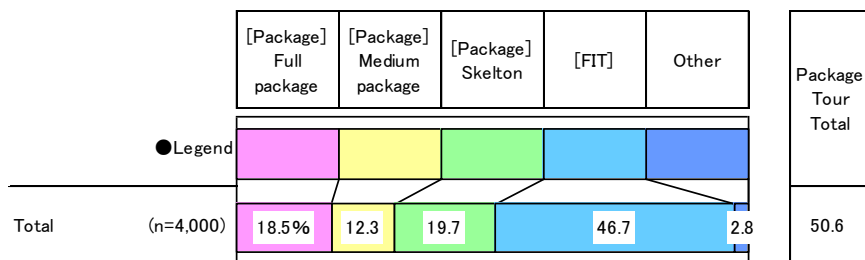
■ Annual Income (Total / Single Answer)



### ■ Purpose for Overseas Travel and Persons Accompanying (Total / Single Answer)

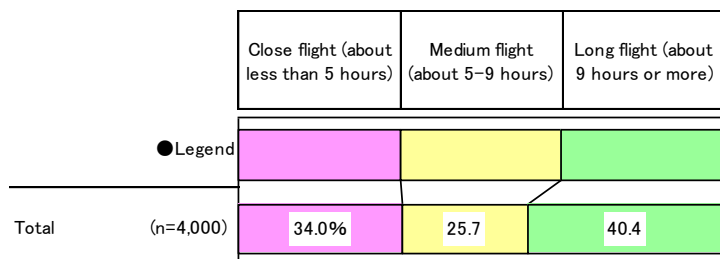


### ■ Overseas Travel Type (Total / Single Answer)

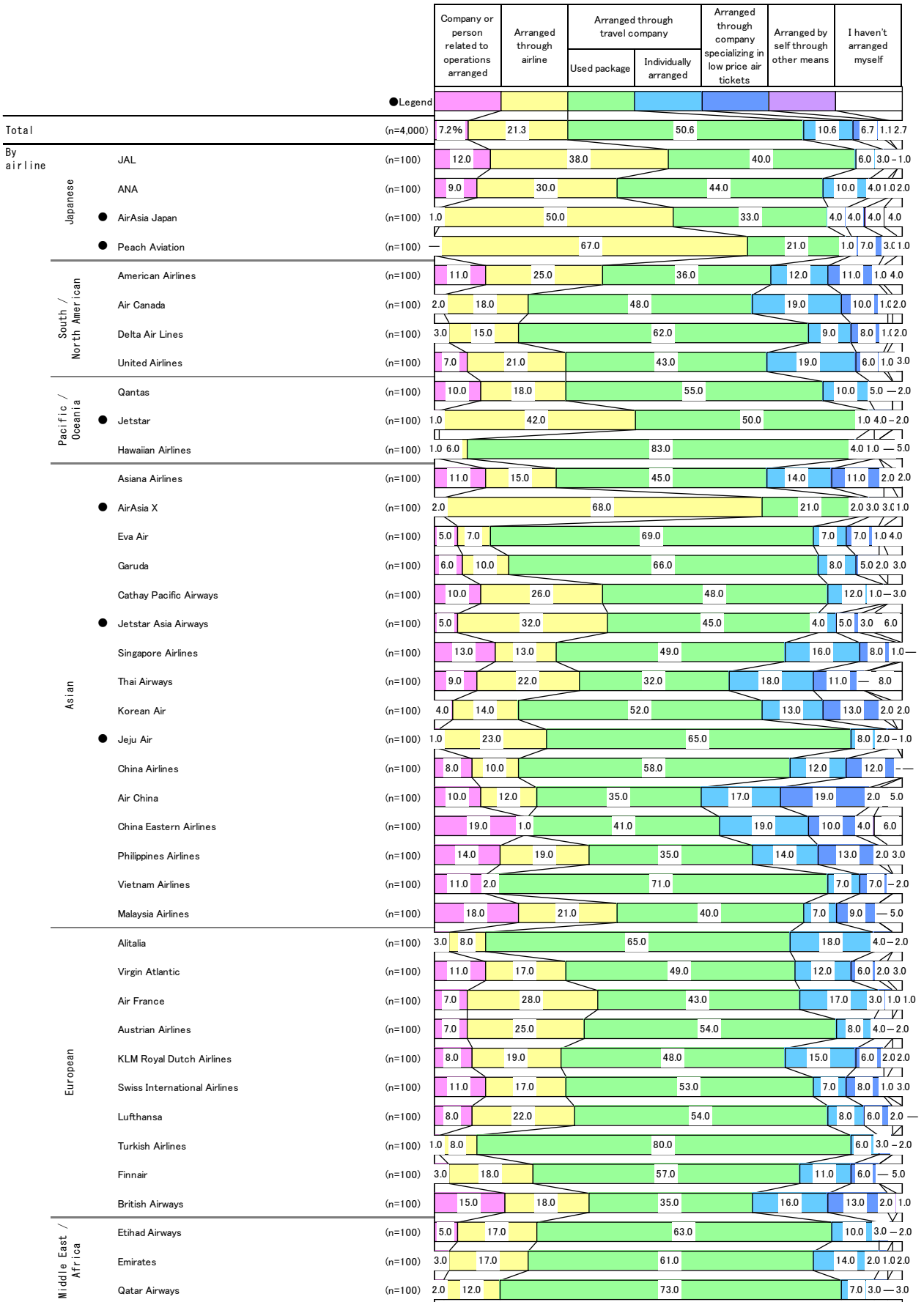


- † [Package] Full package : Tour that is scheduled with sightseeing, activities, and most meals
- [Package] Medium package : Tour that is scheduled with some sightseeing, activities, and meals, as well as tours with some free time
- [Package] Skelton : Tour that basically has free time at destinations, and only includes roundtrip air tickets, hotels, and local transportation
- [FIT] : Air tickets, hotels, etc. are arranged individually

### ■ Time Spent on Flight (per one-way) (Total / Single Answer)

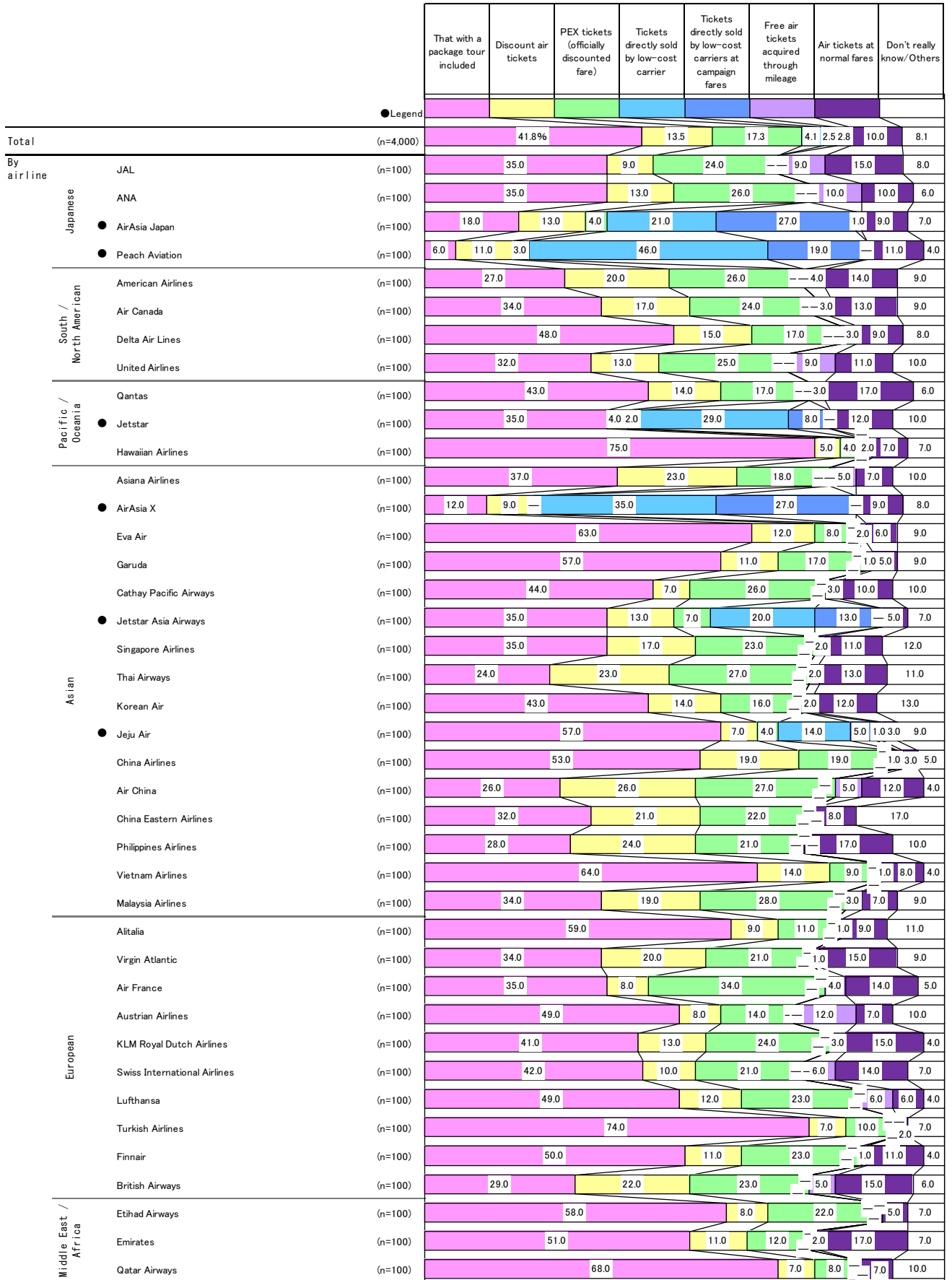


Means of Arranging Air Tickets Used (Total / Single Answer)



† "●" indicates a low-cost carrier (LCC)

### Air Tickets Used (Total / Single Answer)



† "●" indicates a low-cost carrier (LCC)



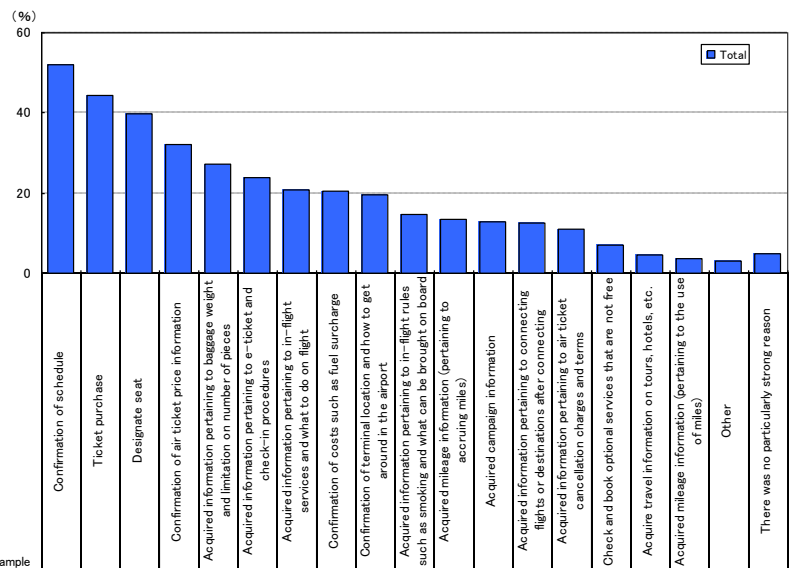
### ■ Whether Airline Website Was Used When Making Overseas Travel (Total / Single Answer)

	Legend	Used		Didn't use		Period used		
		Prior to booking	At time of booking	After booking	Prior to booking	At time of booking	After booking	
Total	(n=4,000)	56.0%		44.0	46.9	37.9	42.5	
By airline								
● Peach Aviation [Japanese]	(n=100)	100.0			99.0	97.0	87.0	
● AirAsia X [Asian]	(n=100)	89.0		11.0	85.0	85.0	79.0	
● AirAsia Japan [Japanese]	(n=100)	88.0		12.0	86.0	82.0	74.0	
JAL [Japanese]	(n=100)	77.0		23.0	66.0	54.0	59.0	
● Jetstar Asia Airways [Asian]	(n=100)	74.0		26.0	66.0	62.0	59.0	
ANA [Japanese]	(n=100)	69.0		31.0	62.0	56.0	56.0	
Virgin Atlantic [European]	(n=100)	68.0		32.0	50.0	42.0	57.0	
British Airways [European]	(n=100)	65.0		35.0	47.0	38.0	51.0	
Air France [European]	(n=100)	64.0		36.0	53.0	43.0	55.0	
● Jetstar [Pacific / Oceania]	(n=100)	63.0		37.0	57.0	55.0	52.0	
American Airlines [South / North American]	(n=100)	63.0		37.0	47.0	44.0	51.0	
Delta Air Lines [South / North American]	(n=100)	60.0		40.0	48.0	38.0	44.0	
Thai Airways [Asian]	(n=100)	59.0		41.0	50.0	40.0	41.0	
Emirates [Middle East / Africa]	(n=100)	59.0		41.0	46.0	29.0	43.0	
Etihad Airways [Middle East / Africa]	(n=100)	58.0		42.0	45.0	33.0	41.0	
Finnair [European]	(n=100)	58.0		42.0	47.0	29.0	41.0	
● Jeju Air [Asian]	(n=100)	55.0		45.0	44.0	37.0	38.0	
United Airlines [South / North American]	(n=100)	55.0		45.0	46.0	39.0	45.0	
Qantas [Pacific / Oceania]	(n=100)	54.0		46.0	48.0	38.0	39.0	
Singapore Airlines [Asian]	(n=100)	53.0		47.0	43.0	32.0	35.0	
China Airlines [Asian]	(n=100)	53.0		47.0	44.0	31.0	42.0	
Lufthansa [European]	(n=100)	53.0		47.0	44.0	35.0	43.0	
KLM Royal Dutch Airlines [European]	(n=100)	52.0		48.0	40.0	35.0	36.0	
Swiss International Airlines [European]	(n=100)	52.0		48.0	40.0	29.0	47.0	
Cathay Pacific Airways [Asian]	(n=100)	51.0		49.0	44.0	40.0	40.0	
Malaysia Airlines [Asian]	(n=100)	51.0		49.0	42.0	33.0	38.0	
Qatar Airways [Middle East / Africa]	(n=100)	51.0		49.0	37.0	31.0	41.0	
Air Canada [South / North American]	(n=100)	49.0		51.0	44.0	30.0	37.0	
Austrian Airlines [European]	(n=100)	47.0		53.0	39.0	23.0	35.0	
Garuda [Asian]	(n=100)	46.0		54.0	40.0	22.0	26.0	
Alitalia [European]	(n=100)	46.0		54.0	36.0	27.0	27.0	
Philippines Airlines [Asian]	(n=100)	45.0		55.0	40.0	35.0	29.0	
Hawaiian Airlines [Pacific / Oceania]	(n=100)	45.0		55.0	36.0	22.0	34.0	
Korean Air [Asian]	(n=100)	44.0		56.0	38.0	30.0	28.0	
Air China [Asian]	(n=100)	42.0		58.0	37.0	24.0	29.0	
Eva Air [Asian]	(n=100)	41.0		59.0	29.0	21.0	26.0	
Turkish Airlines [European]	(n=100)	40.0		60.0	31.0	17.0	24.0	
Asiana Airlines [Asian]	(n=100)	39.0		61.0	33.0	28.0	27.0	
Vietnam Airlines [Asian]	(n=100)	38.0		62.0	28.0	18.0	26.0	
China Eastern Airlines [Asian]	(n=100)	24.0		76.0	17.0	11.0	18.0	

† If the website was used for the air tickets "Prior to booking," "At time of booking" or "After booking," that will be regarded as "Used."

† "●" indicates a low-cost carrier (LCC)

Reason for Using Airline Website (Airline website user / Multiple Answer)

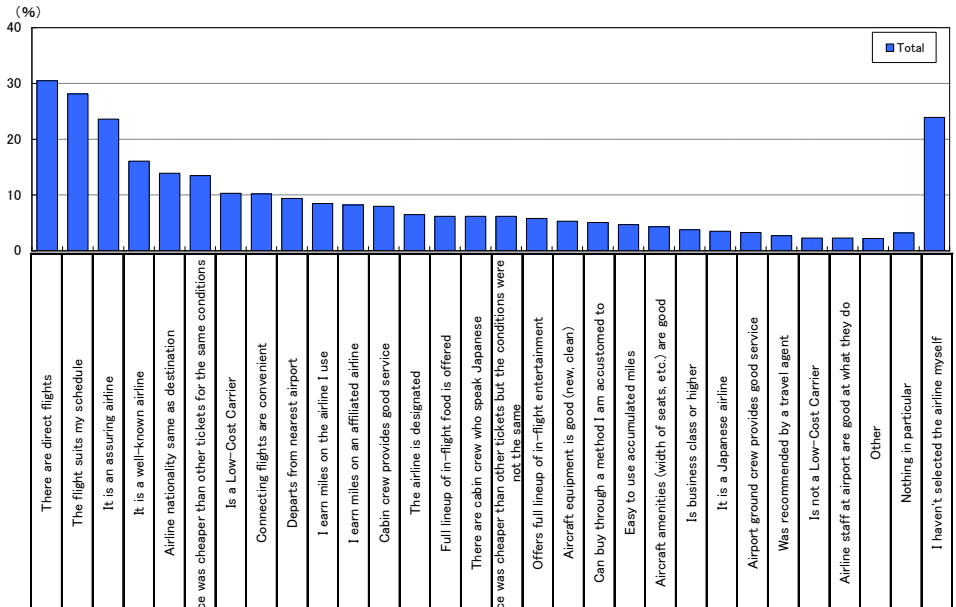


Sample	Confirmation of schedule	Ticket purchase	Designate seat	Confirmation of air ticket price information	Acquired information pertaining to baggage weight and limitation on number of pieces	Acquired information pertaining to e-ticket and check-in procedures	Acquired information pertaining to in-flight services and what to do on flight	Confirmation of costs such as fuel surcharge	Confirmation of terminal location and how to get around in the airport	Acquired information pertaining to in-flight rules such as smoking and what can be brought on board	Acquired mileage information (pertaining to accruing miles)	Acquired campaign information	Acquired information pertaining to connecting flights or destinations after connecting	Acquired information pertaining to air ticket cancellation charges and terms	Check and book optional services that are not free	Acquire travel information on tours, hotels, etc.	Acquired mileage information (pertaining to the use of miles)	Other	There was no particularly strong reason
Total (n=2,240)	51.9	44.4	39.7	32.1	27.2	23.8	20.9	20.5	19.5	14.8	13.5	12.9	12.5	11.1	7.1	4.7	3.8	3.1	4.9
By airline																			
JAL [Japanese] (n=77)	50.6	54.5	68.8	32.5	11.7	35.1	16.9	28.6	15.6	11.7	20.8	16.9	7.8	13.0	1.3	10.4	10.4	2.6	1.3
ANA [Japanese] (n=69)	58.0	63.8	62.3	26.1	5.8	21.7	5.8	20.3	11.6	5.8	17.4	5.8	11.6	8.7	2.9	8.7	8.7	—	2.9
● AirAsia Japan [Japanese] (n=88)	52.3	73.9	36.4	39.8	27.3	25.0	11.4	20.5	18.2	15.9	—	17.0	11.4	18.2	15.9	5.7	—	2.3	6.8
● Peach Aviation [Japanese] (n=100)	63.0	87.0	47.0	57.0	34.0	29.0	12.0	26.0	32.0	18.0	3.0	28.0	10.0	25.0	22.0	2.0	3.0	—	1.0
American Airlines [South / North American] (n=63)	54.0	46.0	52.4	30.2	33.3	31.7	33.3	19.0	27.0	19.0	15.9	11.1	12.7	11.1	6.3	—	6.3	—	4.8
Air Canada [South / North American] (n=49)	51.0	36.7	36.7	30.6	44.9	24.5	10.2	20.4	14.3	20.4	16.3	8.2	12.2	12.2	2.0	—	6.1	8.2	8.2
Delta Air Lines [South / North American] (n=60)	53.3	30.0	48.3	26.7	30.0	18.3	21.7	13.3	18.3	11.7	25.0	16.7	13.3	8.3	3.3	5.0	6.7	5.0	1.7
United Airlines [South / North American] (n=55)	45.5	36.4	56.4	14.5	12.7	23.6	14.5	9.1	16.4	3.6	21.8	9.1	10.9	5.5	3.6	7.3	12.7	1.8	7.3
Qantas [Pacific / Oceania] (n=54)	61.1	51.9	46.3	35.2	33.3	16.7	13.0	16.7	20.4	22.2	3.7	9.3	13.0	11.1	3.7	11.1	5.6	—	1.9
● Jetstar [Pacific / Oceania] (n=63)	57.1	79.4	52.4	33.3	46.0	23.8	20.6	27.0	9.5	15.9	3.2	12.7	4.8	14.3	22.2	3.2	—	—	3.2
Hawaiian Airlines [Pacific / Oceania] (n=45)	40.0	11.1	22.2	17.8	33.3	8.9	28.9	17.8	17.8	20.0	13.2	15.6	11.1	4.4	6.7	11.1	6.7	2.2	11.1
Asiana Airlines [Asian] (n=39)	46.2	30.8	33.3	25.6	10.3	17.9	12.8	25.6	10.3	7.7	2.6	10.3	2.6	10.3	—	2.6	—	2.6	17.9
● AirAsia X [Asian] (n=89)	68.5	87.6	57.3	51.7	32.6	44.9	13.5	27.0	16.9	18.0	5.6	21.3	13.5	16.9	30.3	2.2	2.2	—	—
Eva Air [Asian] (n=41)	34.1	22.0	17.1	12.2	12.2	14.6	26.8	7.3	17.1	4.9	4.9	19.5	2.4	2.4	—	2.4	—	12.2	7.3
Garuda [Asian] (n=46)	32.6	23.9	17.4	21.7	23.9	15.2	21.7	17.4	13.0	23.9	10.9	17.4	8.7	10.9	2.2	10.9	4.3	8.7	6.5
Cathay Pacific Airways [Asian] (n=51)	62.7	56.9	54.9	33.3	21.6	35.3	17.6	19.6	15.7	9.8	9.8	15.7	13.7	11.8	—	3.9	3.9	—	2.0
● Jetstar Asia Airways [Asian] (n=74)	48.6	60.8	29.7	32.4	36.5	14.9	16.2	27.0	16.2	21.6	1.4	14.9	2.7	8.1	16.2	4.1	—	—	4.1
Singapore Airlines [Asian] (n=53)	49.1	34.0	39.6	26.4	18.9	13.2	22.6	15.1	15.1	7.5	11.3	11.3	3.8	5.7	1.9	3.8	3.8	1.9	5.7
Thai Airways [Asian] (n=59)	54.2	50.8	30.5	40.7	18.6	23.7	13.6	25.4	13.6	13.6	10.2	15.3	6.8	6.8	3.4	11.9	3.4	1.7	6.8
Korean Air [Asian] (n=44)	50.0	36.4	36.4	40.9	15.9	15.9	27.7	27.3	13.6	22.7	9.1	11.4	11.4	9.1	4.5	4.5	2.3	2.3	4.5
● Jeju Air [Asian] (n=55)	50.9	49.1	18.2	45.5	30.9	16.4	18.2	10.9	12.7	21.8	5.5	10.9	3.6	5.5	5.5	5.5	—	3.6	1.8
China Airlines [Asian] (n=53)	62.3	30.2	41.5	37.7	15.1	26.4	17.0	20.8	11.3	7.5	13.2	5.7	3.8	7.5	3.8	1.9	—	7.5	5.7
Air China [Asian] (n=42)	50.0	33.3	23.8	28.6	21.4	11.9	19.0	23.8	26.2	14.3	7.1	9.5	14.3	14.3	7.1	2.4	7.1	9.5	4.8
China Eastern Airlines [Asian] (n=24)	45.8	12.5	8.3	12.5	20.8	12.5	8.3	8.3	12.5	4.2	25.0	—	29.2	4.2	—	—	—	4.2	12.5
Philippines Airlines [Asian] (n=45)	60.0	44.4	24.4	40.0	35.6	20.0	11.1	33.3	11.1	11.1	17.8	2.2	6.7	17.8	6.7	2.2	4.4	2.2	4.4
Vietnam Airlines [Asian] (n=38)	36.8	15.8	5.3	21.1	31.6	18.4	23.7	10.5	23.7	21.1	15.8	2.6	18.4	5.3	5.3	13.2	—	—	7.9
Malaysia Airlines [Asian] (n=51)	62.7	37.3	41.2	39.2	25.5	25.5	25.5	29.4	25.5	7.8	23.5	19.6	15.7	11.8	3.9	5.9	—	5.9	3.9
Alitalia [European] (n=46)	43.5	26.1	28.3	28.3	17.4	19.6	23.9	23.9	17.4	6.5	15.2	17.4	6.5	6.5	2.2	2.2	4.3	6.5	10.9
Virgin Atlantic [European] (n=68)	50.0	29.4	32.4	32.4	35.3	30.9	26.5	23.5	27.9	19.1	27.9	22.1	10.3	7.4	10.3	2.9	5.9	2.9	1.5
Air France [European] (n=64)	65.6	45.3	45.3	43.8	32.8	37.5	28.1	28.1	35.9	15.6	14.1	9.4	20.3	17.2	4.7	4.7	7.8	3.1	4.7
Austrian Airlines [European] (n=47)	61.7	38.3	42.6	31.9	34.0	27.7	31.9	23.4	34.0	19.1	23.4	19.1	12.8	17.0	4.3	8.5	6.4	4.3	4.3
KLM Royal Dutch Airlines [European] (n=52)	53.8	42.3	50.0	32.7	34.6	28.8	32.7	21.2	21.2	21.2	25.0	9.6	17.3	11.5	7.7	1.9	7.7	—	1.9
Swiss International Airlines [European] (n=52)	59.6	34.6	44.2	36.5	36.5	30.8	26.9	19.2	32.7	17.3	26.9	13.5	30.8	13.5	5.8	7.7	3.8	7.7	7.7
Lufthansa [European] (n=53)	45.3	35.8	49.1	20.8	22.6	22.6	22.6	20.8	26.4	11.3	15.1	11.3	24.5	13.2	3.8	3.8	3.8	5.7	7.5
Turkish Airlines [European] (n=40)	32.5	22.5	17.5	30.0	37.5	22.5	35.0	15.0	17.5	12.5	22.5	10.0	22.5	10.0	5.0	5.0	—	2.5	7.5
Finnair [European] (n=58)	58.6	34.5	43.1	32.8	32.8	31.0	36.2	24.1	29.3	15.5	20.7	17.2	25.9	12.1	—	6.9	3.4	—	3.4
British Airways [European] (n=65)	52.3	30.8	49.2	20.0	26.2	32.3	20.0	12.3	21.5	15.4	7.7	9.2	10.8	12.3	6.2	—	3.1	3.1	4.6
Ethiad Airways [Middle East / Africa] (n=58)	29.3	32.8	32.8	15.5	20.7	13.8	41.4	13.8	15.5	12.1	24.1	3.4	15.5	5.2	—	1.7	1.7	3.4	3.4
Emirates [Middle East / Africa] (n=59)	44.1	27.1	28.8	25.4	35.6	11.9	33.9	8.5	20.3	15.3	16.9	1.7	16.9	8.5	3.4	1.7	1.7	6.8	3.4
Qatar Airways [Middle East / Africa] (n=51)	33.3	27.5	27.5	21.6	21.6	11.8	15.7	17.6	9.8	15.7	9.8	3.9	23.5	3.9	2.0	—	—	5.9	11.8

† "●" indicates a low-cost carrier (LCC)

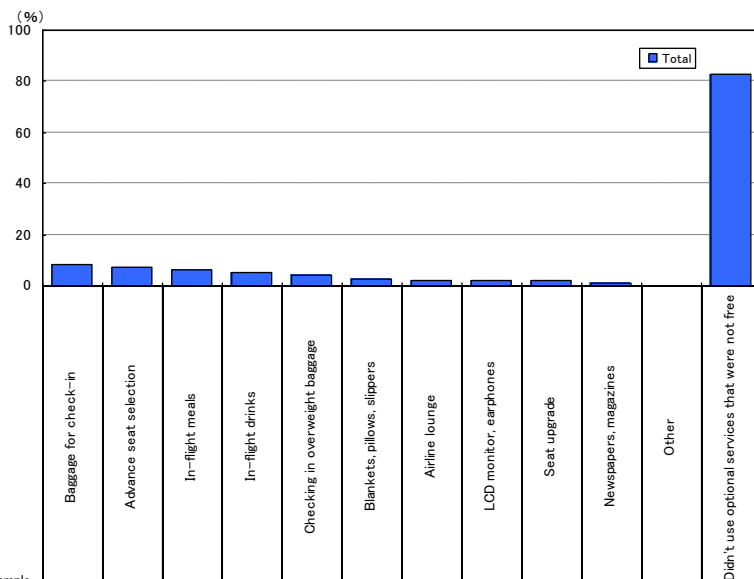
† Reference data due to the same size being less than 30s.

■ Items of Importance When Choosing Airline (Total / Multiple Answer)



Sample		Items of Importance When Choosing Airline (%)																													
Total (n=4,000)		30.5	28.1	23.6	16.1	13.9	13.5	10.3	10.2	9.4	8.5	8.2	8.0	6.5	6.2	6.2	6.2	5.8	5.3	5.1	4.7	4.3	3.8	3.5	3.3	2.7	2.3	2.3	2.2	3.2	23.9
Gender	Male (n=1,970)	31.8	27.8	26.2	18.3	15.4	12.9	10.8	10.2	9.7	9.6	9.7	9.6	5.9	6.9	7.4	6.2	5.5	6.3	5.4	5.3	4.9	5.2	4.4	3.2	2.7	2.8	2.6	1.7	3.7	19.3
	Female (n=2,030)	29.3	28.4	21.0	13.9	12.5	14.0	9.9	10.1	9.0	7.4	6.7	6.4	7.0	5.6	5.1	6.2	6.2	4.3	4.7	4.1	3.7	2.4	2.6	3.3	2.7	1.7	1.9	2.6	2.7	28.3
Age	18-29 yrs (n=464)	22.6	24.8	22.4	16.4	6.5	15.7	12.5	9.3	9.5	3.7	4.7	4.7	6.7	5.0	3.7	7.3	6.9	3.2	3.2	3.0	2.4	1.3	2.2	2.8	3.9	1.5	0.9	0.9	3.4	25.9
	30-39 yrs (n=900)	29.4	31.6	23.9	16.7	11.3	15.3	13.0	8.8	7.9	6.7	7.4	7.1	4.8	5.7	5.2	7.4	7.3	4.3	5.6	4.6	3.6	1.6	3.6	3.6	3.0	1.6	2.1	1.4	3.9	20.8
	40-49 yrs (n=1,027)	33.7	32.0	25.0	16.8	14.0	14.6	10.7	11.2	11.0	11.5	9.4	7.7	4.3	6.5	5.6	5.8	5.5	6.9	6.4	5.5	5.3	4.3	3.3	3.9	2.5	3.2	2.5	2.4	3.2	17.6
	50 yrs or older (n=1,609)	31.4	24.6	22.8	15.1	17.4	11.1	8.0	10.5	9.1	9.0	8.8	9.6	8.8	6.7	7.8	5.4	4.9	5.4	4.4	4.7	4.7	5.5	3.9	2.9	2.4	2.2	2.5	2.8	2.6	29.0
Area of residence	Kanto (n=1,986)	32.5	30.0	25.3	16.6	16.1	13.5	7.5	10.2	7.4	10.2	10.5	8.8	5.8	7.3	6.2	6.1	6.9	5.6	5.4	5.3	5.0	5.1	3.4	3.6	2.6	2.9	2.3	2.6	2.6	23.2
	Kansai (n=910)	29.6	26.7	21.2	15.5	10.7	16.7	16.7	10.0	12.6	6.4	6.0	7.4	6.2	4.5	5.9	8.1	4.5	4.9	6.4	4.0	2.9	2.6	3.7	2.5	3.4	2.0	2.0	1.3	4.3	22.1
	Tokai (n=447)	25.1	26.2	23.5	14.5	13.0	13.0	8.5	11.6	14.1	7.6	7.2	6.0	8.3	5.6	5.6	4.9	5.4	5.4	3.6	4.7	4.3	2.7	4.0	2.2	2.0	0.9	2.0	2.0	5.1	24.8
By travel type	Package (n=2,022)	23.6	17.9	19.0	13.6	11.2	5.9	4.9	5.0	6.9	4.6	3.8	6.6	10.2	6.0	6.0	2.5	4.7	3.7	1.9	1.9	3.2	2.6	3.0	2.6	3.8	1.5	1.9	1.1	3.0	40.4
	Full package (n=740)	15.8	7.8	15.4	11.1	9.9	2.2	2.3	3.6	3.8	3.1	5.0	5.5	13.2	5.0	4.7	0.9	3.8	2.4	0.3	0.9	3.2	1.8	1.9	1.6	2.4	1.2	1.4	1.1	2.8	54.1
	Medium package (n=493)	22.5	16.0	20.5	13.4	9.9	4.7	4.7	4.1	7.7	3.4	2.8	6.9	10.8	6.7	6.3	2.6	5.1	3.7	1.0	2.4	3.2	2.6	5.1	3.2	5.1	1.2	2.6	0.4	2.2	40.0
	Skelton (n=789)	31.6	28.4	21.5	16.0	13.3	10.1	7.5	6.8	9.4	6.7	3.3	7.5	7.1	6.6	7.0	3.9	5.4	4.9	3.9	2.5	3.0	3.4	2.7	3.0	4.3	1.9	1.9	1.6	3.7	27.9
	FIT (n=1,867)	38.1	39.3	28.3	19.0	16.7	21.7	15.8	15.6	12.2	12.2	12.8	9.4	2.5	6.6	6.6	9.9	6.9	7.0	8.4	7.7	5.5	5.0	4.2	4.0	1.7	3.2	2.7	3.2	3.3	6.1
Accompanying traveler	Travel alone (n=618)	33.8	33.8	24.6	16.5	15.9	18.3	17.5	12.1	10.7	12.9	11.3	9.5	4.9	6.3	5.3	10.8	8.4	7.1	9.2	6.3	5.7	3.6	3.6	4.0	1.1	2.1	2.8	4.0	3.4	9.5
	Married couple / Couple / Honeymoon (n=1,151)	28.8	23.8	21.6	14.9	13.8	10.9	8.2	9.6	8.3	6.7	7.4	8.1	8.2	7.2	7.1	5.2	4.9	5.0	3.8	4.3	4.3	4.1	2.8	3.1	3.0	1.8	2.0	2.1	2.3	30.1
	With friend (n=672)	29.5	25.1	19.0	14.9	11.5	12.6	11.5	7.3	8.8	4.9	4.8	5.4	8.8	4.9	5.7	6.3	4.3	2.5	4.3	2.2	2.7	1.5	2.8	2.8	3.7	1.8	1.0	1.8	3.6	29.8
	Family travel (n=663)	30.5	28.4	24.0	16.6	13.3	14.5	10.0	9.4	10.6	7.7	5.4	7.7	7.1	5.4	6.3	5.1	5.7	5.9	3.2	5.3	4.1	3.2	3.9	3.5	2.9	2.3	3.2	1.5	2.4	27.3
By person accompanying	Is business class or higher (n=450)	36.9	32.9	40.0	22.2	22.0	7.3	4.2	16.0	9.6	16.9	14.0	19.1	5.3	17.6	11.1	2.4	8.0	12.7	6.2	11.6	15.6	32.9	6.0	9.1	1.1	5.6	8.0	1.8	2.7	8.4
	Economy class (n=3,550)	29.7	27.5	21.5	15.3	12.9	14.3	11.1	9.4	9.3	7.4	7.4	6.6	6.6	4.8	5.6	6.7	5.5	4.4	4.9	3.8	2.9	0.1	3.2	2.5	2.9	1.8	1.5	2.2	3.2	25.8

■ Optional Services Not Free That Were Used (Total / Multiple Answer)



		Sample												
Total		(n=4,000)	8.4	7.2	6.2	5.0	4.1	2.4	2.1	2.0	2.0	1.2	0.1	82.6
By airline	JAL [Japanese]	(n=100)	2.0	8.0	5.0	5.0	2.0	4.0	4.0	4.0	2.0	3.0	—	87.0
	ANA [Japanese]	(n=100)	7.0	7.0	5.0	4.0	3.0	2.0	2.0	3.0	1.0	1.0	—	89.0
	● AirAsia Japan [Japanese]	(n=100)	34.0	23.0	21.0	15.0	15.0	4.0	3.0	—	3.0	2.0	—	41.0
	● Peach Aviation [Japanese]	(n=100)	44.0	35.0	21.0	17.0	9.0	6.0	2.0	4.0	6.0	2.0	—	32.0
	American Airlines [South / North American]	(n=100)	9.0	13.0	7.0	9.0	6.0	—	7.0	3.0	1.0	3.0	—	79.0
	Air Canada [South / North American]	(n=100)	9.0	3.0	5.0	6.0	9.0	2.0	—	2.0	—	1.0	—	82.0
	Delta Air Lines [South / North American]	(n=100)	3.0	4.0	2.0	1.0	2.0	—	2.0	—	4.0	1.0	—	87.0
	United Airlines [South / North American]	(n=100)	4.0	6.0	4.0	3.0	2.0	1.0	1.0	1.0	3.0	1.0	—	89.0
	Qantas [Pacific / Oceania]	(n=100)	11.0	9.0	11.0	10.0	6.0	4.0	2.0	4.0	1.0	2.0	—	73.0
	● Jetstar [Pacific / Oceania]	(n=100)	23.0	22.0	22.0	17.0	25.0	8.0	1.0	8.0	—	1.0	1.0	42.0
	Hawaiian Airlines [Pacific / Oceania]	(n=100)	5.0	4.0	6.0	4.0	4.0	1.0	1.0	1.0	1.0	1.0	—	88.0
	Asiana Airlines [Asian]	(n=100)	2.0	3.0	—	—	1.0	—	1.0	—	—	—	—	95.0
	● AirAsia X [Asian]	(n=100)	38.0	33.0	36.0	13.0	12.0	5.0	1.0	4.0	8.0	—	—	31.0
	Eva Air [Asian]	(n=100)	4.0	5.0	3.0	2.0	—	2.0	1.0	2.0	—	1.0	—	93.0
	Garuda [Asian]	(n=100)	4.0	4.0	5.0	4.0	—	3.0	7.0	1.0	4.0	1.0	—	90.0
	Cathay Pacific Airways [Asian]	(n=100)	3.0	—	4.0	4.0	1.0	1.0	2.0	1.0	—	1.0	—	93.0
	● Jetstar Asia Airways [Asian]	(n=100)	26.0	18.0	11.0	10.0	20.0	4.0	1.0	4.0	3.0	—	—	47.0
	Singapore Airlines [Asian]	(n=100)	8.0	3.0	3.0	4.0	2.0	4.0	2.0	4.0	3.0	1.0	—	85.0
	Thai Airways [Asian]	(n=100)	4.0	1.0	3.0	2.0	1.0	3.0	2.0	1.0	1.0	—	—	95.0
	Korean Air [Asian]	(n=100)	6.0	5.0	5.0	4.0	1.0	4.0	—	3.0	—	2.0	—	92.0
	● Jeju Air [Asian]	(n=100)	5.0	5.0	4.0	4.0	2.0	3.0	2.0	1.0	1.0	2.0	—	92.0
	China Airlines [Asian]	(n=100)	3.0	3.0	4.0	2.0	1.0	—	1.0	—	—	—	—	92.0
	Air China [Asian]	(n=100)	5.0	3.0	4.0	2.0	4.0	1.0	1.0	2.0	—	1.0	—	89.0
	China Eastern Airlines [Asian]	(n=100)	6.0	2.0	2.0	3.0	2.0	—	2.0	1.0	—	—	—	90.0
	Philippines Airlines [Asian]	(n=100)	8.0	2.0	—	1.0	4.0	1.0	1.0	1.0	1.0	—	—	90.0
	Vietnam Airlines [Asian]	(n=100)	4.0	3.0	3.0	4.0	—	—	—	—	—	1.0	—	93.0
	Malaysia Airlines [Asian]	(n=100)	3.0	6.0	5.0	4.0	2.0	1.0	—	—	2.0	—	—	91.0
	Alitalia [European]	(n=100)	3.0	1.0	3.0	3.0	2.0	—	—	1.0	3.0	1.0	—	92.0
	Virgin Atlantic [European]	(n=100)	6.0	4.0	5.0	5.0	3.0	3.0	8.0	2.0	9.0	1.0	—	78.0
	Air France [European]	(n=100)	5.0	4.0	4.0	4.0	5.0	3.0	1.0	2.0	2.0	1.0	2.0	88.0
	Austrian Airlines [European]	(n=100)	6.0	7.0	7.0	6.0	1.0	6.0	3.0	4.0	3.0	2.0	—	90.0
	KLM Royal Dutch Airlines [European]	(n=100)	2.0	6.0	4.0	3.0	2.0	1.0	—	2.0	4.0	1.0	—	88.0
	Swiss International Airlines [European]	(n=100)	8.0	6.0	6.0	8.0	4.0	3.0	6.0	3.0	1.0	5.0	—	84.0
	Lufthansa [European]	(n=100)	4.0	3.0	2.0	3.0	—	2.0	1.0	2.0	2.0	2.0	—	92.0
Turkish Airlines [European]	(n=100)	2.0	1.0	—	—	1.0	—	—	—	3.0	—	—	93.0	
Finnair [European]	(n=100)	4.0	2.0	4.0	3.0	1.0	2.0	3.0	2.0	—	1.0	1.0	91.0	
British Airways [European]	(n=100)	8.0	11.0	4.0	5.0	2.0	4.0	5.0	3.0	1.0	1.0	—	84.0	
Ethiad Airways [Middle East / Africa]	(n=100)	4.0	4.0	3.0	2.0	1.0	2.0	2.0	2.0	2.0	2.0	—	94.0	
Emirates [Middle East / Africa]	(n=100)	2.0	4.0	2.0	3.0	3.0	3.0	1.0	2.0	2.0	1.0	—	90.0	
Qatar Airways [Middle East / Africa]	(n=100)	3.0	3.0	2.0	2.0	1.0	2.0	4.0	1.0	1.0	—	—	92.0	

† "●" indicates a low-cost carrier (LCC)

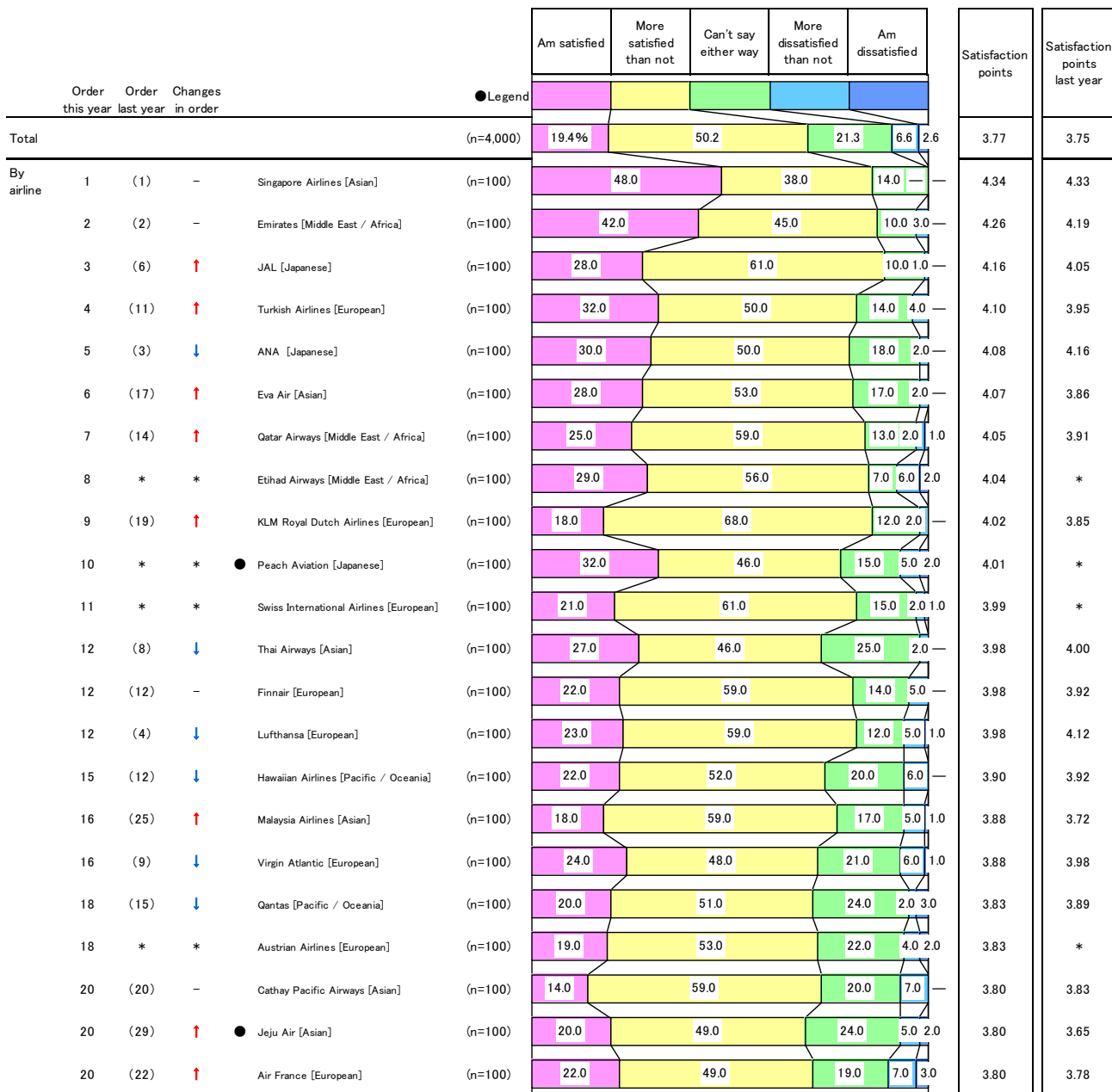
## **Part 2: Airline Evaluations**



# 1. Overall Satisfaction: Top 20

- The overall satisfaction total average was 3.77 points.
- As was the case last year, the top spot went to Singapore Airlines (4.34 points), second place was Emirates (4.26 points). This was followed by JAL (4.16 points).
- Among LCC, Peach Aviation made 10<sup>th</sup> place with 4.01 points.

## ■ Airline Overall Satisfaction (Total / Single Answer)



† Satisfaction points are the weighted average based on calculations of "Am satisfied" as +5, "More satisfied than not" as +4, "Can't say either way" as +3, "More dissatisfied than not" as +2, and "Am dissatisfied" as +1.

† "Overall Satisfaction Points" is not the total of satisfaction points by category but rather the figure calculated from individual questions in this survey.

† "●" indicates a low-cost carrier (LCC)

† Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.

## 2. Satisfaction by Attribute

### 1) Aircraft Equipment and Amenities: Top 20

- The total average of satisfaction with “Aircraft Equipment and Amenities” was 3.59 points.
- Singapore Airlines and Emirates both received 4.20 points and tied for first place. This was followed by Etihad Airways (4.05 points).
- Turkish Airlines increased its figure to 3.90 points, moving up dramatically in the ranking from 14<sup>th</sup> last year to 4<sup>th</sup> this time.
- The top reasons for satisfaction and reasons for dissatisfaction were "Newness/cleanness of plane" and "Width/comfort of seats."

#### ■ Satisfaction with Aircraft Equipment and Amenities (Total / Single Answer)

				● Legend					Satisfaction points	Satisfaction points last year	
Order this year	Order last year	Changes in order		Am satisfied	More satisfied than not	Can't say either way	More dissatisfied than not	Am dissatisfied			
<b>Total</b>				(n=4,000)	15.8%	40.3	33.2	8.2	2.5	3.59	3.54
By airline	1	(1)	-	Singapore Airlines [Asian]	(n=100)	37.0	50.0	10.0	2.0	4.20	4.13
	1	(2)	↑	Emirates [Middle East / Africa]	(n=100)	41.0	42.0	13.0	4.0	4.20	4.12
	3	*	*	Etihad Airways [Middle East / Africa]	(n=100)	27.0	54.0	17.0	1.0	4.05	*
	4	(14)	↑	Turkish Airlines [European]	(n=100)	26.0	42.0	28.0	4.0	3.90	3.73
	5	(4)	↓	Lufthansa [European]	(n=100)	25.0	46.0	23.0	5.0	3.89	3.97
	6	(7)	↑	ANA [Japanese]	(n=100)	25.0	43.0	27.0	3.0	3.86	3.84
	7	(13)	↑	Eva Air [Asian]	(n=100)	24.0	40.0	33.0	3.0	3.85	3.74
	7	(3)	↓	Qatar Airways [Middle East / Africa]	(n=100)	24.0	45.0	25.0	4.0	3.85	3.98
	9	(11)	↑	JAL [Japanese]	(n=100)	18.0	49.0	30.0	3.0	3.82	3.77
	10	*	*	Swiss International Airlines [European]	(n=100)	19.0	49.0	27.0	4.0	3.81	*
	11	(20)	↑	KLM Royal Dutch Airlines [European]	(n=100)	19.0	48.0	26.0	6.0	3.78	3.60
	12	(10)	↓	Thai Airways [Asian]	(n=100)	21.0	42.0	31.0	4.0	3.76	3.78
	13	(5)	↓	Finnair [European]	(n=100)	16.0	50.0	28.0	5.0	3.75	3.89
	14	(16)	↑	Air France [European]	(n=100)	20.0	44.0	25.0	10.0	3.72	3.69
	15	(18)	↑	Hawaiian Airlines [Pacific / Oceania]	(n=100)	13.0	50.0	31.0	5.0	3.69	3.63
	16	(20)	↑	Cathay Pacific Airways [Asian]	(n=100)	14.0	44.0	37.0	5.0	3.67	3.60
	17	(24)	↑	Malaysia Airlines [Asian]	(n=100)	13.0	45.0	35.0	6.0	3.63	3.49
	18	(22)	↑	Qantas [Pacific / Oceania]	(n=100)	15.0	40.0	40.0	2.0	3.62	3.58
	19	(23)	↑	Garuda [Asian]	(n=100)	14.0	44.0	32.0	9.0	3.61	3.52
	20	(11)	↓	Asiana Airlines [Asian]	(n=100)	12.0	44.0	37.0	6.0	3.60	3.77

† Satisfaction points are the weighted average based on calculations of "Am satisfied" as +5, "More satisfied than not" as +4, "Can't say either way" as +3, "More dissatisfied than not" as +2, and "Am dissatisfied" as +1.

† Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.

#### ■ Reasons for Satisfaction / Reasons for Dissatisfaction with Aircraft Equipment and Amenities (Total / Multiple Answer)

Sample		(%)						
		Newness/cleanness of plane	Width/comfort of seats	Comfort of temperature/climate control/light control	Extent of in-flight amenities available	Comfort of toilets	Other	Nothing in particular
Reasons for satisfaction	2,242	37.3	34.0	24.2	22.4	12.6	1.3	25.4
Reasons for dissatisfaction	1,758	16.3	31.9	8.5	13.8	11.5	3.2	42.6

† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

## 2. Satisfaction by Attribute

### 2) Service by Cabin Crew: Top 20

- The total average of satisfaction with the “service by cabin crew” was 3.67 points.
- Singapore Airlines came in first, as was the case last year, with 4.20 points. Second place was Emirates (4.14 points), which moved up dramatically from 8<sup>th</sup> place last year. This was followed by JAL (4.12 points).
- The top reason for satisfaction and reason for dissatisfaction were both “Courtesy of response.”

#### ■ Satisfaction with Service by Cabin Crew (Total / Single Answer)

				● Legend					Satisfaction points	Satisfaction points last year		
Order this year	Order last year	Changes in order		Am satisfied	More satisfied than not	Can't say either way	More dissatisfied than not	Am dissatisfied				
Total (n=4,000)				17.4%	43.8	29.8	6.7	2.4	3.67	3.68		
By airline	1	(1)	-	Singapore Airlines [Asian]	(n=100)	40.0	45.0	11.0	3.0	1.0	4.20	4.27
	2	(8)	↑	Emirates [Middle East / Africa]	(n=100)	35.0	45.0	19.0	1.0	1.0	4.14	3.96
	3	(3)	-	JAL [Japanese]	(n=100)	26.0	61.0	12.0	1.0	1.0	4.12	4.01
	4	(2)	↓	ANA [Japanese]	(n=100)	29.0	49.0	20.0	2.0	2.0	4.05	4.02
	5	(13)	↑	KLM Royal Dutch Airlines [European]	(n=100)	21.0	56.0	22.0	1.0	1.0	3.97	3.85
	5	*	*	Swiss International Airlines [European]	(n=100)	27.0	50.0	18.0	3.0	2.0	3.97	*
	7	(18)	↑	Eva Air [Asian]	(n=100)	23.0	51.0	25.0	1.0	1.0	3.96	3.75
	8	(6)	↓	Finnair [European]	(n=100)	20.0	57.0	21.0	2.0	2.0	3.95	3.97
	9	(18)	↑	Malaysia Airlines [Asian]	(n=100)	23.0	52.0	21.0	3.0	1.0	3.93	3.75
	10	(15)	↑	Turkish Airlines [European]	(n=100)	26.0	43.0	28.0	3.0	1.0	3.92	3.82
	11	*	*	Etihad Airways [Middle East / Africa]	(n=100)	22.0	53.0	19.0	4.0	2.0	3.89	*
	12	(5)	↓	Thai Airways [Asian]	(n=100)	22.0	48.0	23.0	6.0	1.0	3.84	3.98
	12	*	*	Austrian Airlines [European]	(n=100)	22.0	44.0	30.0	4.0	4.0	3.84	*
	14	(10)	↓	Lufthansa [European]	(n=100)	19.0	51.0	25.0	4.0	1.0	3.83	3.92
	15	(20)	↑	Qantas [Pacific / Oceania]	(n=100)	18.0	51.0	25.0	3.0	3.0	3.78	3.74
	15	(10)	↓	Qatar Airways [Middle East / Africa]	(n=100)	18.0	52.0	23.0	4.0	3.0	3.78	3.92
	17	(14)	↓	Asiana Airlines [Asian]	(n=100)	15.0	50.0	33.0	1.0	1.0	3.77	3.84
	17	(21)	↑	Air France [European]	(n=100)	22.0	44.0	26.0	5.0	3.0	3.77	3.71
	19	(26)	↑	● Jeju Air [Asian]	(n=100)	19.0	42.0	34.0	4.0	1.0	3.74	3.64
	20	*	*	● Peach Aviation [Japanese]	(n=100)	18.0	45.0	29.0	7.0	1.0	3.72	*

† Satisfaction points are the weighted average based on calculations of "Am satisfied" as +5, "More satisfied than not" as +4, "Can't say either way" as +3, "More dissatisfied than not" as +2, and "Am dissatisfied" as +1.

† "●" indicates a low-cost carrier (LCC)

† Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.

#### ■ Reasons for Satisfaction / Reasons for Dissatisfaction with Service by Cabin Crew (Total / Multiple Answer)

Sample	(%)						
	Speed of response	Courtesy of response	Accuracy of response	Announcements at time of takeoff, landing, etc.	Other	Nothing in particular	
Reasons for satisfaction	2,449	21.8	59.7	24.6	16.5	2.2	21.3
Reasons for dissatisfaction	1,551	12.4	28.4	8.6	6.9	6.0	51.2

† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

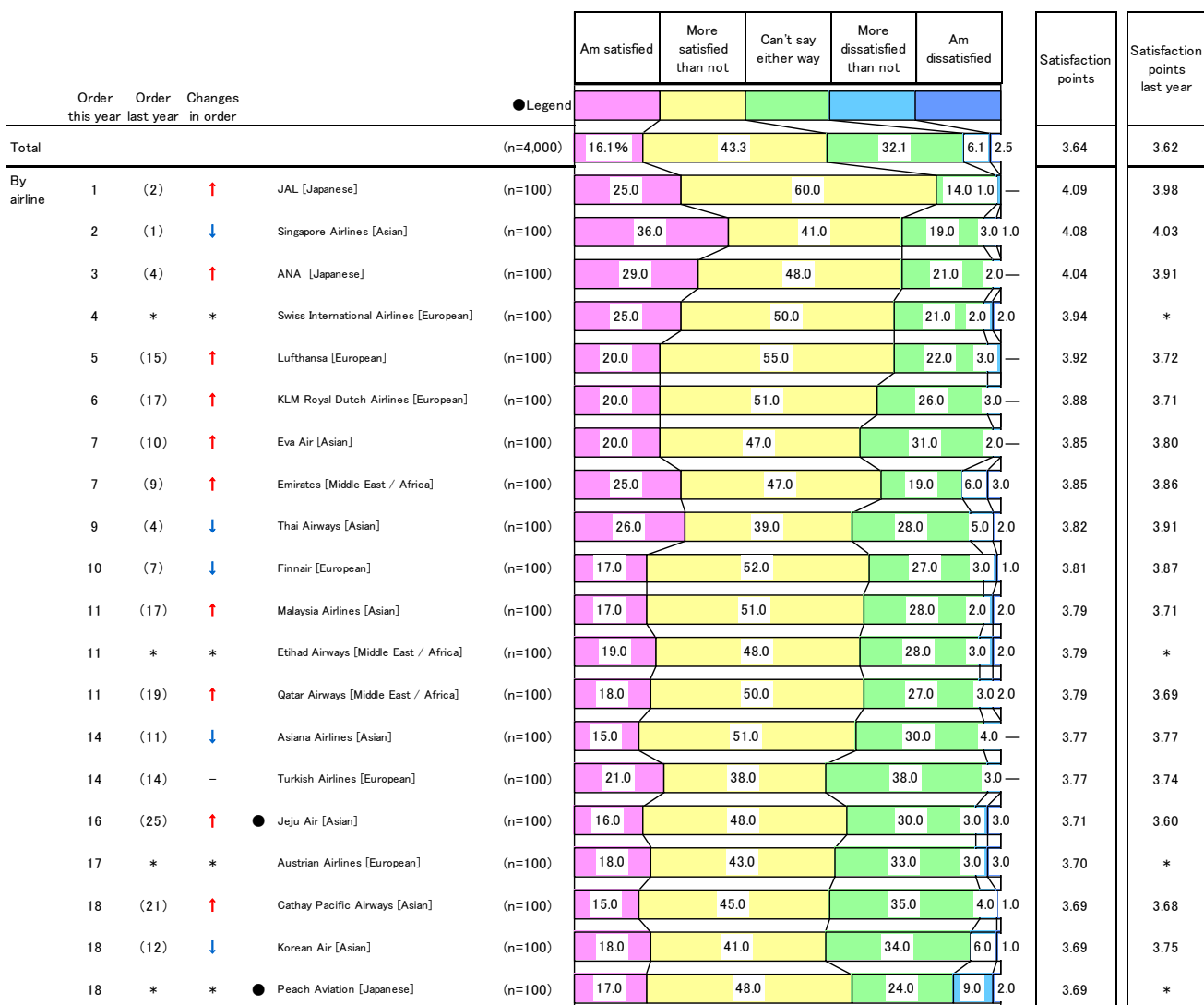


## 2. Satisfaction by Attribute

### 3) Service by Ground Crew: Top 20

- The total average of satisfaction with the “service by ground crew” was 3.64 points.
- With 4.09 points, JAL moved from the number two last year to number one this year. This was followed by Singapore Airlines (4.08 points) and ANA (4.04 points).
- The top response in terms of both reasons for satisfaction and reasons for dissatisfaction was "Smoothness of check-in, baggage check."

#### ■ Satisfaction with Service by Ground Crew (Total / Single Answer)



† Satisfaction points are the weighted average based on calculations of "Am satisfied" as +5, "More satisfied than not" as +4, "Can't say either way" as +3, "More dissatisfied than not" as +2, and "Am dissatisfied" as +1.

† "●" indicates a low-cost carrier (LCC)

† Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.

#### ■ Reasons for Satisfaction / Reasons for Dissatisfaction with Service by Ground Crew (Total / Multiple Answer)

Sample	Smoothness of check-in, baggage check	Announcements about boarding gate and connecting	Announcements about baggage inspections and limitations on carry-on bags	Information about/response to excess baggage charge	Other	Nothing in particular
Reasons for satisfaction	2,376	59.2	29.3	14.5	6.0	28.9
Reasons for dissatisfaction	1,624	23.3	13.3	8.1	5.1	57.9

† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

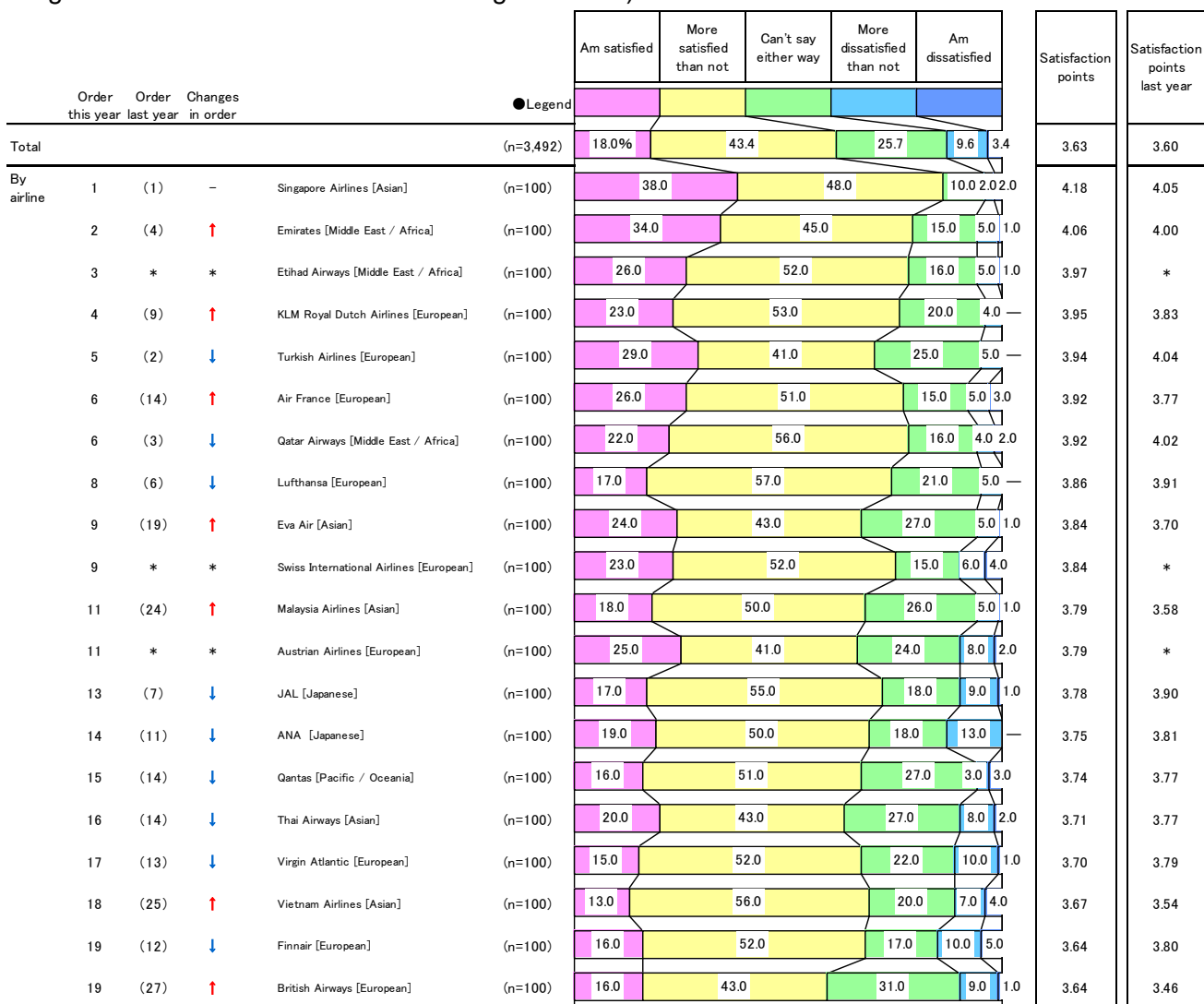
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

## 2. Satisfaction by Attribute

### 4) In-flight Food and Drink Service: Top 20

- The total average of satisfaction with “in-flight food and drink service” was 3.63 points.
- As was the case last year, Singapore Airlines was ranked at the top, with 4.18 points. This was followed by Emirates (4.06 points) and Etihad Airways (3.97 points).
- Given most as both reasons for satisfaction and reasons for dissatisfaction was "Taste of meals."

#### ■ Satisfaction with in-flight Food and Drink Service (in-flight food and drink service users / Single Answer)



† Satisfaction points are the weighted average based on calculations of "Am satisfied" as +5, "More satisfied than not" as +4, "Can't say either way" as +3, "More dissatisfied than not" as +2, and "Am dissatisfied" as +1.

† Because there are people who do not use in-flight food and drink services on low-cost carriers (LCC), Air Asia X, Jetstar Asia, Jetstar, Peach Aviation, and Air Asia Japan were left out of tabulations due to the number of users being less than 80s.

† Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.

#### ■ Reasons for Satisfaction / Reasons for Dissatisfaction with in-flight Food and Drink Service (in-flight food and drink service users / Multiple Answer)

Sample	Taste of meals	Amount of meals	Refreshments, snacks, desserts	Soft drinks	Alcoholic beverages	Extent of meals and drinks provided for free	Other	Nothing in particular	
Reasons for satisfaction	2,142	66.3	46.7	29.5	33.8	33.4	40.1	1.3	4.9
Reasons for dissatisfaction	1,350	58.7	13.4	13.2	5.7	6.2	12.3	3.6	23.3

† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

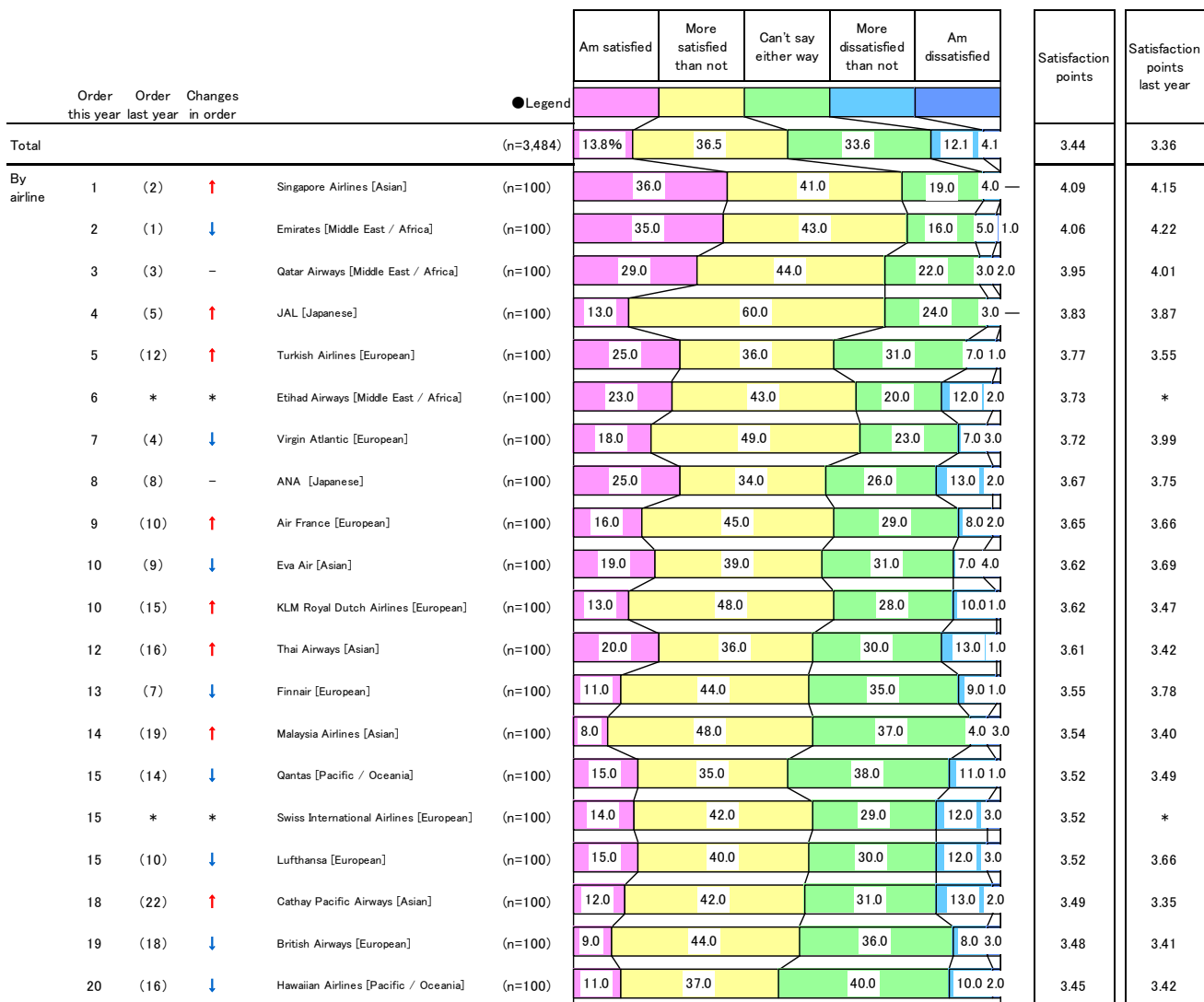
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

## 2. Satisfaction by Attribute

### 5) In-flight Entertainment: Top 20

- The total average of satisfaction with “in-flight entertainment” was 3.44 points.
- With 4.09 points, Singapore Airlines moved from second place last year to first this year. This was followed by Emirates (4.06 points) and Qatar Airways (3.95 points).
- Given by notably many as the reasons for satisfaction and reasons for dissatisfaction were “Movies / TV programs available” and “Number of TV channels and movies.”

#### ■ Satisfaction with in-flight Entertainment (in-flight entertainment users / Single Answer)



† Satisfaction points are the weighted average based on calculations of "Am satisfied" as +5, "More satisfied than not" as +4, "Can't say either way" as +3, "More dissatisfied than not" as +2, and "Am dissatisfied" as +1.

† Because there are people who do not use in-flight entertainment on low-cost carriers (LCC), Air Asia X, Jetstar Asia, Jetstar, Peach Aviation, and Air Asia Japan were left out of tabulations due to the number of users being less than 80s.

† Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.

#### ■ Reasons for Satisfaction / Reasons for Dissatisfaction with in-flight Entertainment (in-flight entertainment users / Multiple Answer)

	Sample	Number of TV channels and movies	Movies/TV programs available	Number of music channels	Music program content	Game types/content	In-flight magazine	Magazines, newspapers	On-demand broadcasts	Seatback TV	Extent of the free entertainment that is available	Prices, selection, etc. of in-flight sales	Other	Nothing in particular
Reasons for satisfaction	1,750	46.0	52.6	15.7	14.3	12.1	9.9	8.6	6.7	7.0	8.9	3.9	0.3	15.7
Reasons for dissatisfaction	1,734	23.3	35.2	8.9	9.3	6.5	7.7	7.0	3.4	4.6	5.2	3.0	4.7	39.1

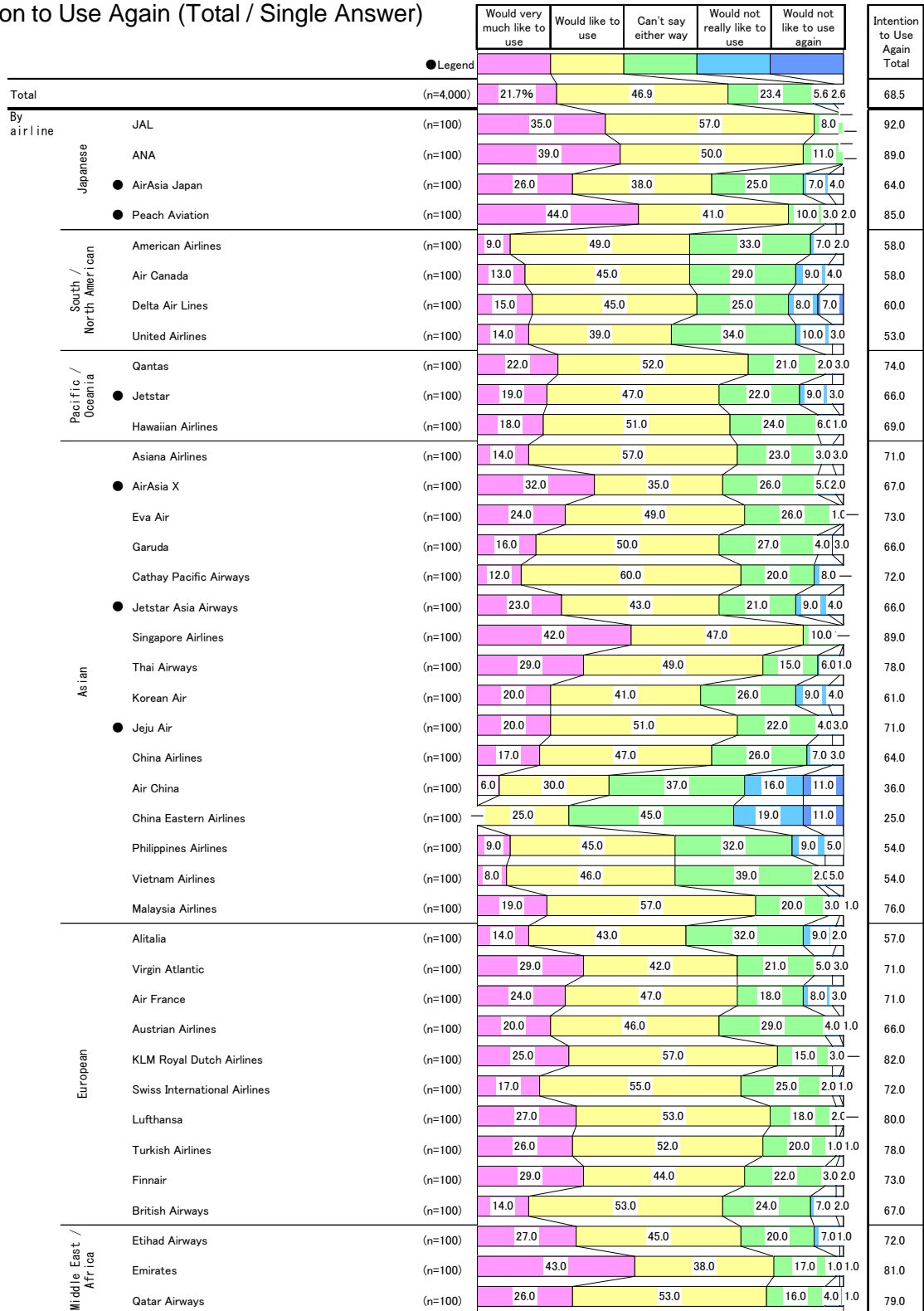
† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

### 3. Intention to Use Again

- The intention to use again total (i.e., "Would very much like to use": 22% and "Would like to use") was 69%.
- By airline, the "Intention to Use Again total" for JAL was 92% and for ANA and Singapore Airlines was 89%, rounding out the top 3.
- Among LCC, Peach Aviation's "Intention to Use Again total" was 85%, placing it fourth among the total.

#### ■ Intention to Use Again (Total / Single Answer)

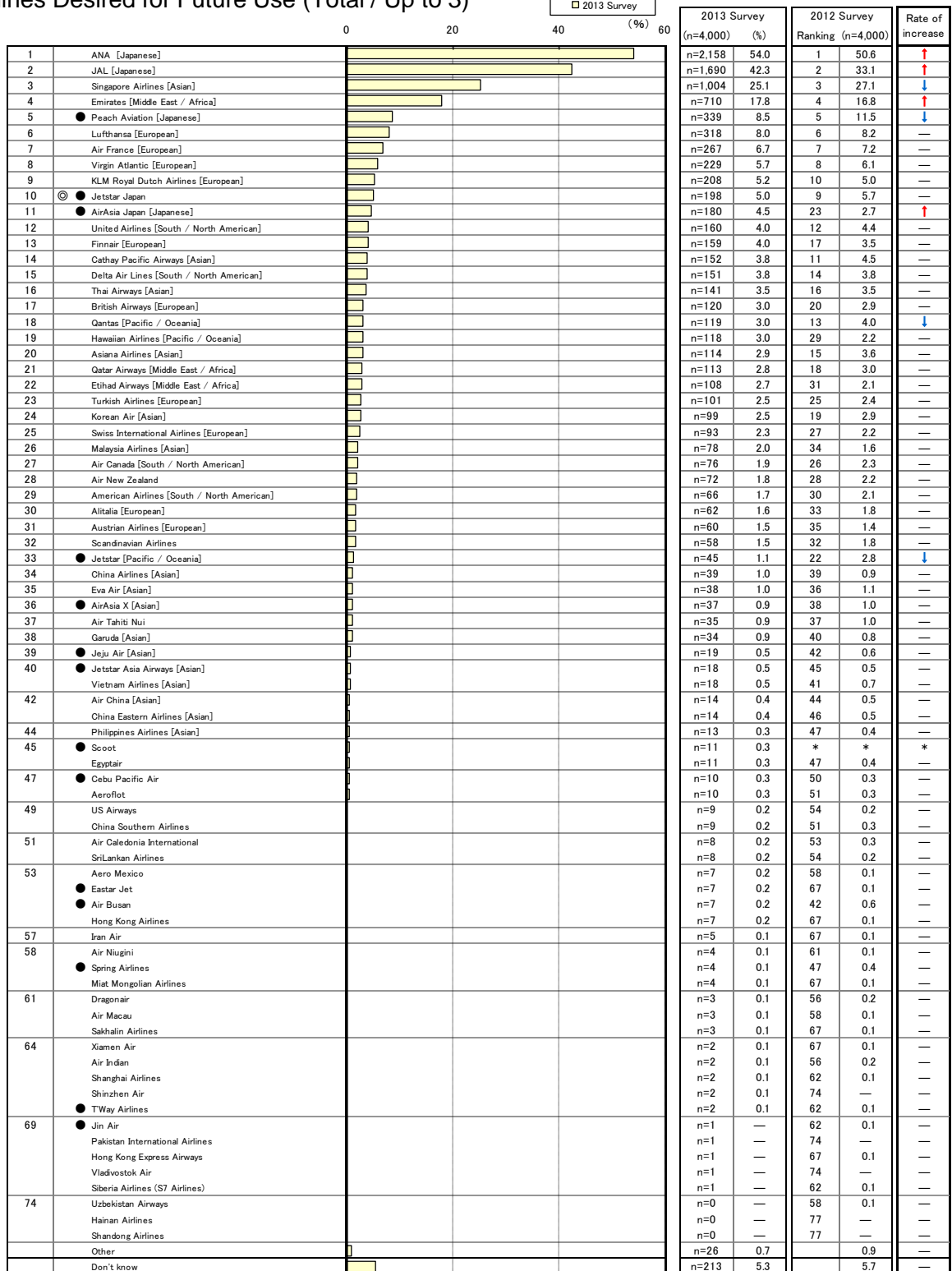


† "●" indicates a low-cost carrier (LCC)

## 4. Airlines Desired for Future Use

- When asked about the airlines they wanted to try in the future, 54% of the respondents gave ANA, which left it in the top spot, as was the case last year. This was followed by JAL (42%) and Singapore Airlines (25%).
- Among LCC, Peach Aviation ranked fifth, with 9%.

### ■ Airlines Desired for Future Use (Total / Up to 3)



† Respondents were asked about airlines they would like to try using for international flights.

† "◎" indicates airlines without international flights and "●" indicates low-cost carriers (LCC), both at the time of the study (April 2013).

† Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.

† Rate of increase: The arrow indicates increases/decreases for airlines for which there were changes of plus or minus one point between the 2012 survey and 2013 survey.

# Reference: From Results of the "2013 AB-ROAD Overseas Travel Survey"

## 1. Low-cost Carriers (LCC): Awareness, Ever Use, Intention to Use

### "2013 AB-ROAD Overseas Travel Survey" Outline

#### Objective

To provide related parties with reference data by ascertaining the facts regarding overseas travelers' booking practices, consumer behavior, popular destinations, and destinations desired for visit.

#### Respondents

Selected from the INTAGE Net Monitors of INTAGE Inc., these were Japanese citizens aged 18 years and over who traveled overseas in the year 2012 (the month of departure being in 2012).

#### Timing

Mon. 25 Mar. through Mon. Apr. 1, 2013

#### Research Method

Internet survey

#### Numbers Tabulated

5,077 respondents (respondents contacted: 7,862; samples collected: 5,193 (successful collection rate of :66.1%))

#### Method of Tabulation

The survey results were weighted to correspond with the breakdown of leisure travelers (by gender and age).

The weightings used are as follows..

Male				Female			
18-29 yrs	30-39 yrs	40-49 yrs	50 yrs+	18-29 yrs	30-39 yrs	40-49 yrs	50 yrs+
0.572	0.799	0.930	1.711	1.023	0.838	0.661	1.438

#### Analysis Axes

The following are the definitions of "light, " "middle, " and " heavy, " which were the classifications used for data categorized "by number of previous trips."

Light: Those who have traveled overseas one to three times before

Middle: Those who have traveled overseas four to nine times before

Heavy: Those who have traveled overseas ten times or more before

- The use intention total for low-cost carriers was 56% (i.e., the sum of "I would like to use aggressively" (18%) and "I would like to use somewhat").
- A breakdown by age shows that among both males and females, the sum of "I would like to use aggressively" and "I would like to use somewhat" was higher the younger respondents were and the less overseas travel experience they had.

#### Intention to Use Low-cost Carriers (Total / Single Answer)

			I would like to use aggressively	I would like to use somewhat	I would not really like to use	I would not like to use at all
● Legend						
Total (n=5,078)			18.4%	37.8	33.7	10.1
Gender	Male (n=2,509)		19.9	37.0	32.7	10.4
	Female (n=2,569)		16.9	38.5	34.6	9.9
Gender & age	Male 18-29 yrs (n=348)		26.3	44.9	22.0	6.7
	Male 30-39 yrs (n=489)		26.3	41.8	24.2	7.7
	Male 40-49 yrs (n=591)		19.5	40.2	29.8	10.6
	Male 50 yrs or older (n=1,081)		15.2	30.5	41.6	12.7
	Female 18-29 yrs (n=646)		24.9	45.5	25.2	4.4
	Female 30-39 yrs (n=545)		20.9	43.1	27.2	8.8
	Female 40-49 yrs (n=428)		13.9	40.3	33.6	12.2
	Female 50 yrs or older (n=951)		10.6	30.4	45.7	13.3
	Number of trips taken	Light (n=844)		19.4	44.5	29.4
Middle (n=1,420)			18.4	40.6	33.8	7.2
Heavy (n=2,815)			18.1	34.3	34.9	12.7

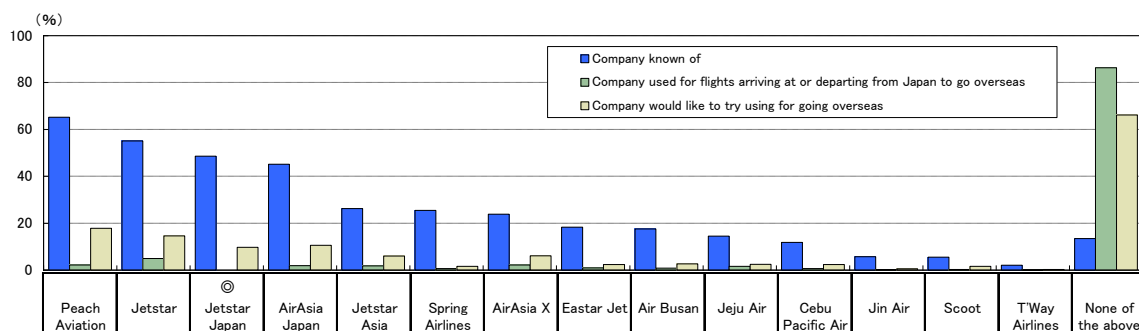
† Respondents were asked about their intention to use low-cost carriers when going overseas for travel/leisure purposes.

# Reference: From Results of the "2013 AB-ROAD Overseas Travel Survey"

## 1. Low-cost Carriers (LCC): Awareness, Ever Use, Intention to Use

- When respondents were asked about their awareness of low-cost carriers, the highest percentage cited "Peach Aviation." This was followed by "Jetstar."
- As for previous use of LCC on overseas trips departing from and arriving at Japan, "Jetstar" was given by 5%. 86% had never used before.
- As for LCC respondents wanted to try using in the future for overseas travel, "Peach Aviation (18%)" and "Jetstar (15%)" were the top two choices. These were followed by "AirAsia Japan (11%)" and "Jetstar Japan (10%)."

### ■ Low-cost Carrier Awareness / Ever Use / Intention to Use (Total / Multiple Answer each)



Sample	Peach Aviation	Jetstar	Jetstar Japan	AirAsia Japan	Jetstar Asia Airways	Spring Airlines	AirAsia X	Eastar Jet	Air Busan	Jeju Air	Cebu Pacific Air	Jin Air	Scoot	T'Way Airlines	None of the above
Company known of (n=5,078)	65.2	55.1	48.6	45.2	26.3	25.5	23.9	18.3	17.6	14.5	11.8	5.7	5.5	2.1	13.5
Company used for flights arriving at or departing from Japan to go overseas (n=5,078)	2.2	5.0	*	1.9	1.8	0.7	2.2	1.0	0.9	1.6	0.7	0.2	0.3	0.1	86.3
Company would like to try using for going overseas (n=5,078)	17.9	14.6	9.7	10.6	6.0	1.6	6.1	2.4	2.7	2.5	2.4	0.6	1.6	0.3	66.2

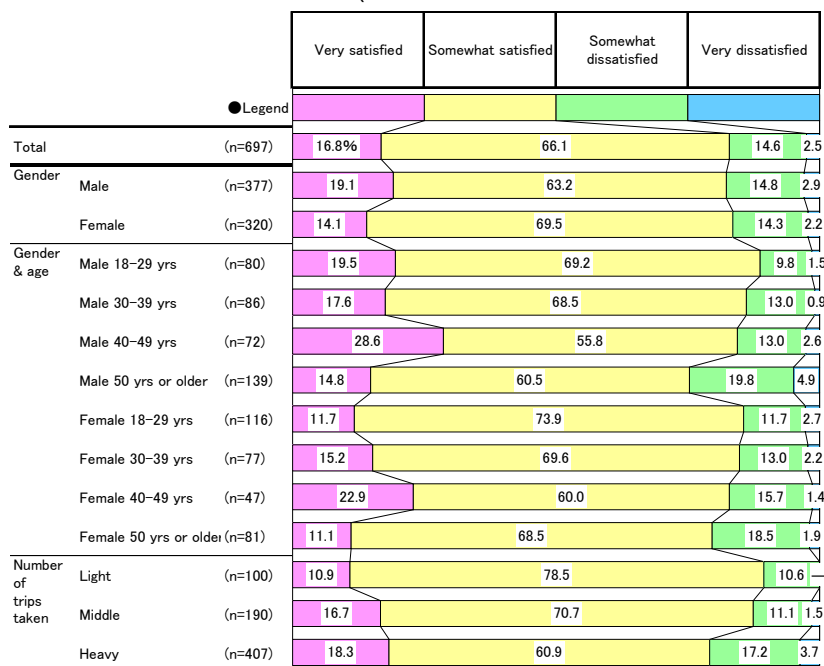
† "©" indicates airlines without international flights at the time of the study (Mar. 2013).

† Airlines marked with an asterisk are those not asked about as a "Company used for flights arriving at or departing from Japan to go overseas" because they did not have international flights at the time of the survey.

## Reference: From Results of the "2013 AB-ROAD Overseas Travel Survey" 2. Evaluations of Low-cost Carriers (LCC)

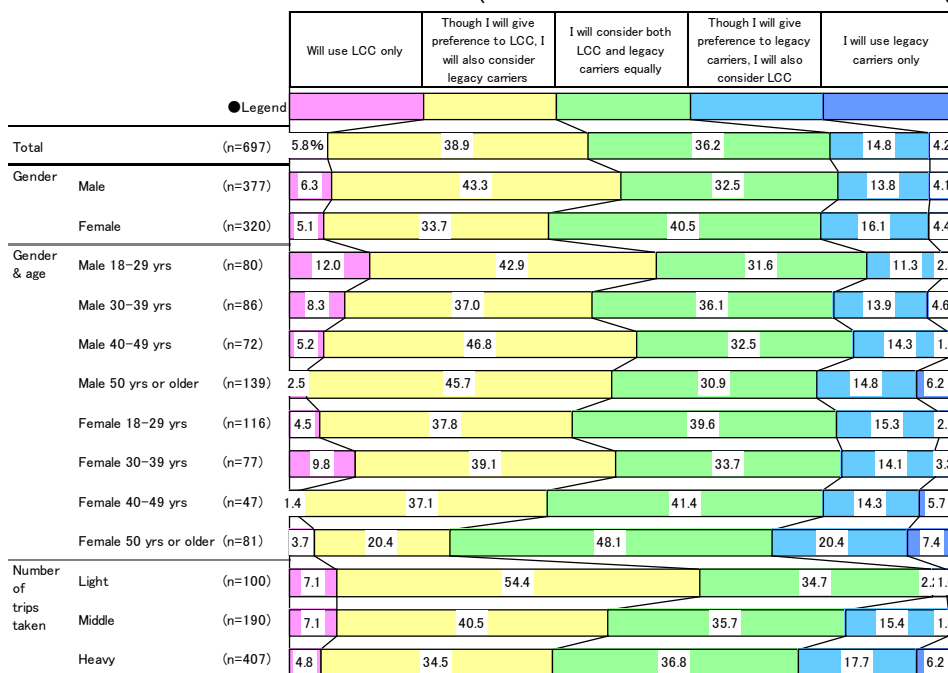
- As for satisfaction with low-cost carriers used, the sum of "Very satisfied" (17%) and "Somewhat satisfied" was 83%.
- A breakdown by gender and age shows that among males and female 40-49 years old, "Very satisfied" received a high percentage.
- As for the intention to continue to use low-cost carriers, the sum of "I will use LCC only" (6%) and "Though I will give preference to LCC, I will also consider existing airlines" was 45%.
- By number of previous trips, the sum of "I will use LCC only" and "Though I will give preference to LCC, I will also consider existing airlines" was higher the less the travel experience.

### ■ Satisfaction with Low-cost Carriers (ever-users of low-cost carriers / Single Answer)



† Those who had used low-cost carriers for international flights arriving at or departing from Japan were asked about their satisfaction when using.

### ■ Future Intention to Use Low-cost Carriers (ever-users of low-cost carriers / Single Answer)



† Those who had used low-cost carriers for international flights arriving at or departing from Japan were asked about which they would rather use for future overseas travel for leisure between low-cost carriers and legacy carriers.



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