

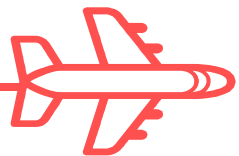
エイビロード  
**AB-ROAD**

**エアライン**

**満足度調査2014**

Market Survey Of Airline Satisfaction

～2013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 2013.

## ○Respondents

The survey was done on 5,987 respondents selected from the INTAGE's Net Monitor Panel of INTAGE Inc. These were Japanese citizens aged 18 years and over who traveled overseas in the year 2013 (the month of departure being in 2013). \* Respondents included also those who traveled for work purposes and those on long-term stays.

## ○Timing

Wed. 16 April through Mon. 21 April, 2014

## ○Research Method

Internet survey

## ○Tabulation Numbers

4,000 respondents (respondents contacted: 5,987, samples collected: 4,337s (successful collection rate of 72.4%))

\* 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, Air New Zealand, Jetstar, Hawaiian Airlines, Asiana Airlines, AirAsia X, Eva Air, Garuda, Cathay Pacific Airways, Jetstar Asia Airways, Singapore Airlines, Scoot, Thai Airways, Korean Air, Jeju Air, 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 2013, according to the results of the "2014 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.  
"2013 Airline Satisfaction Survey" - Timing: 19 April through 23 April 2013; Sample size tabulated: 4,000s (100 samples for each airline)
- (3) In this survey, respondents who in 2013 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.

## "2014 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's Net Monitor Panel of INTAGE Inc., these were Japanese citizens aged 18 years and over who traveled overseas in the year 2013 (the month of departure being in 2013).

### ○Timing

Mon. 24 Mar through Thu. 27 Mar, 2014

### ○Research Method

Internet survey

### ○Numbers Tabulated

4,936 respondents (respondents contacted: 7,902; samples collected: 5,200 (successful collection rate of :65.8%))

### ○Method of Tabulation

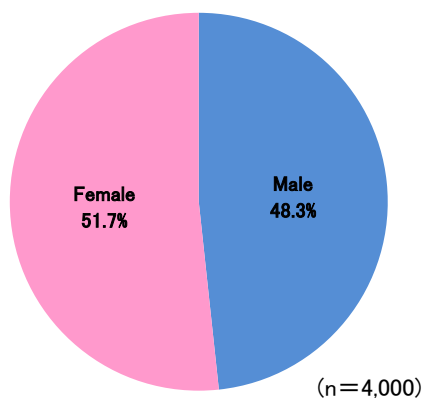
The survey results were weighted to correspond with the breakdown of leisure travelers (by gender and age).

The weightings used are as follows.

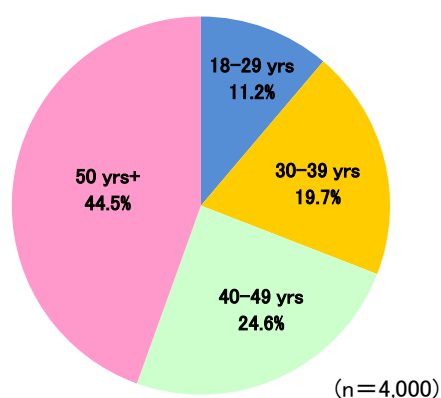
Male				Female			
18-29 yrs	30-39 yrs	40-49 yrs	50 yrs+	18-29 yrs	30-39 yrs	40-49 yrs	50 yrs+
0.557	0.841	0.977	1.779	1.018	0.794	0.676	1.349

## 2. Profile of the Respondents

■ Gender (Total / Single Answer)



■ Age (Total / Single Answer)



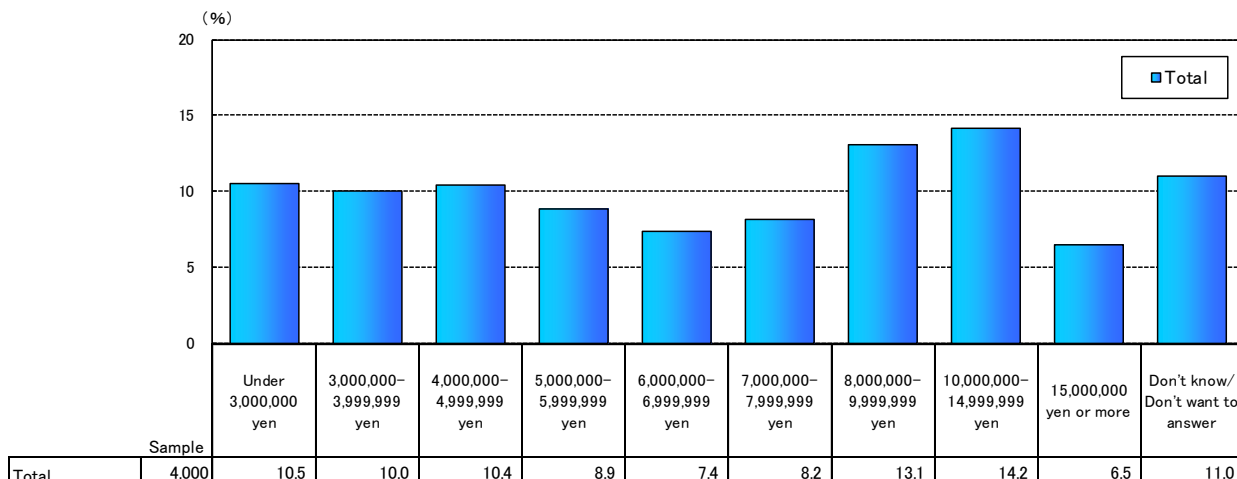
■ Area of Residence (Total / Single Answer)

	Sample	Area of Residence (%)												
		Hokkaido	Tohoku	Kanto Total	Kita Kanto	4 prefectures	Hokuriku/ Koshinetsu	Chubu/ Tokai	Kansai Total	Keihanshin	Other Kinki	Chugoku	Shikoku	Kyushu/ Okinawa
Total	4,000	2.3	2.6	50.0	2.7	47.3	3.2	11.6	21.7	18.6	3.1	3.2	1.2	4.3

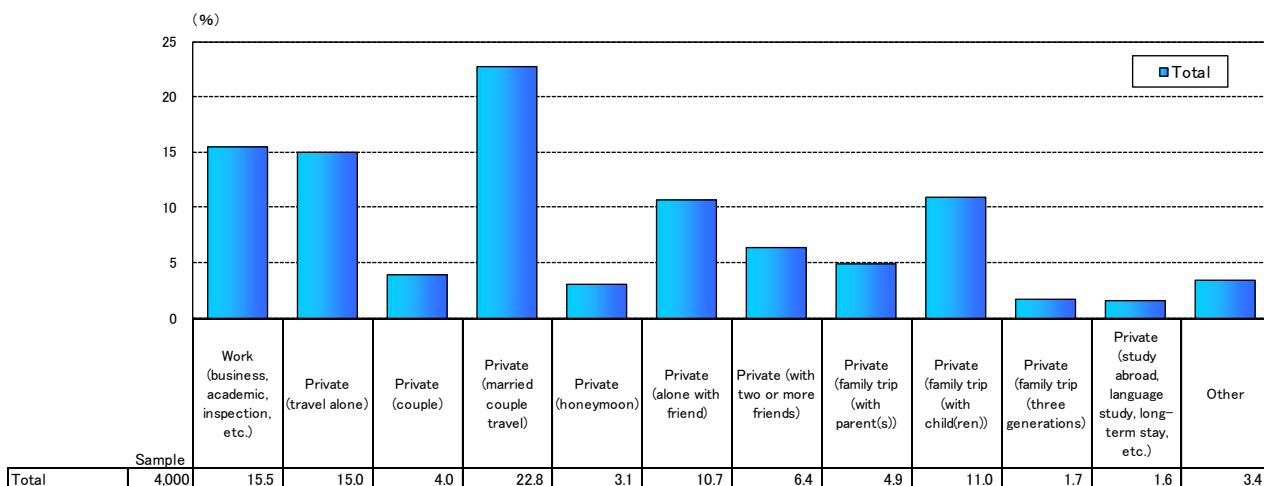
■ Occupation (Total / Single Answer)

	Sample	Occupation (%)													
		Office workers/ General (clerical)	Office workers/ General (research or technical)	Office workers/ General (sales)	Office workers/ General (others)	Office workers/ Manager class, company directors	Civil servants/ Educators	Self-employed	Freelance	Temporary worker/ Contracted employee	Part-timers	Students	Full-time housewives	Unemployed	Other
Total	4,000	15.9	9.0	4.4	3.4	11.7	5.2	6.2	2.9	3.7	8.2	2.3	16.2	9.8	1.2

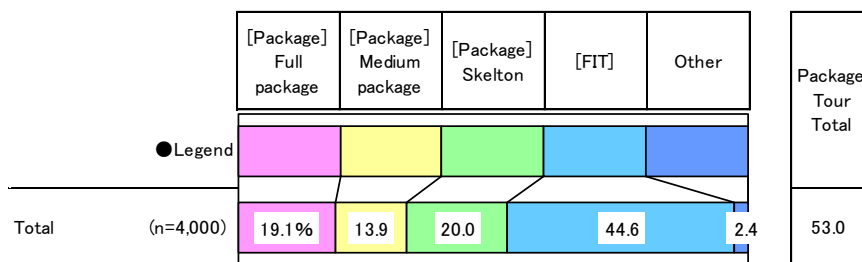
■ Annual Household Income (Total / Single Answer)



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

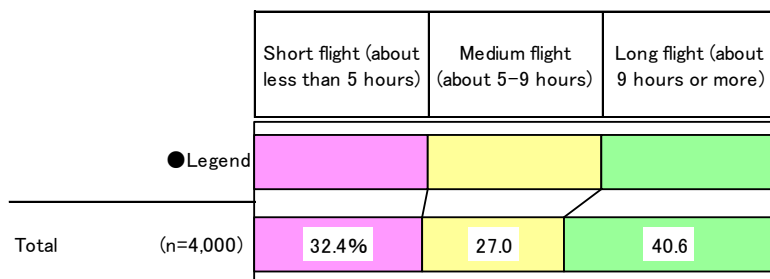


### ■ Overseas Travel Type (Total / Single Answer)

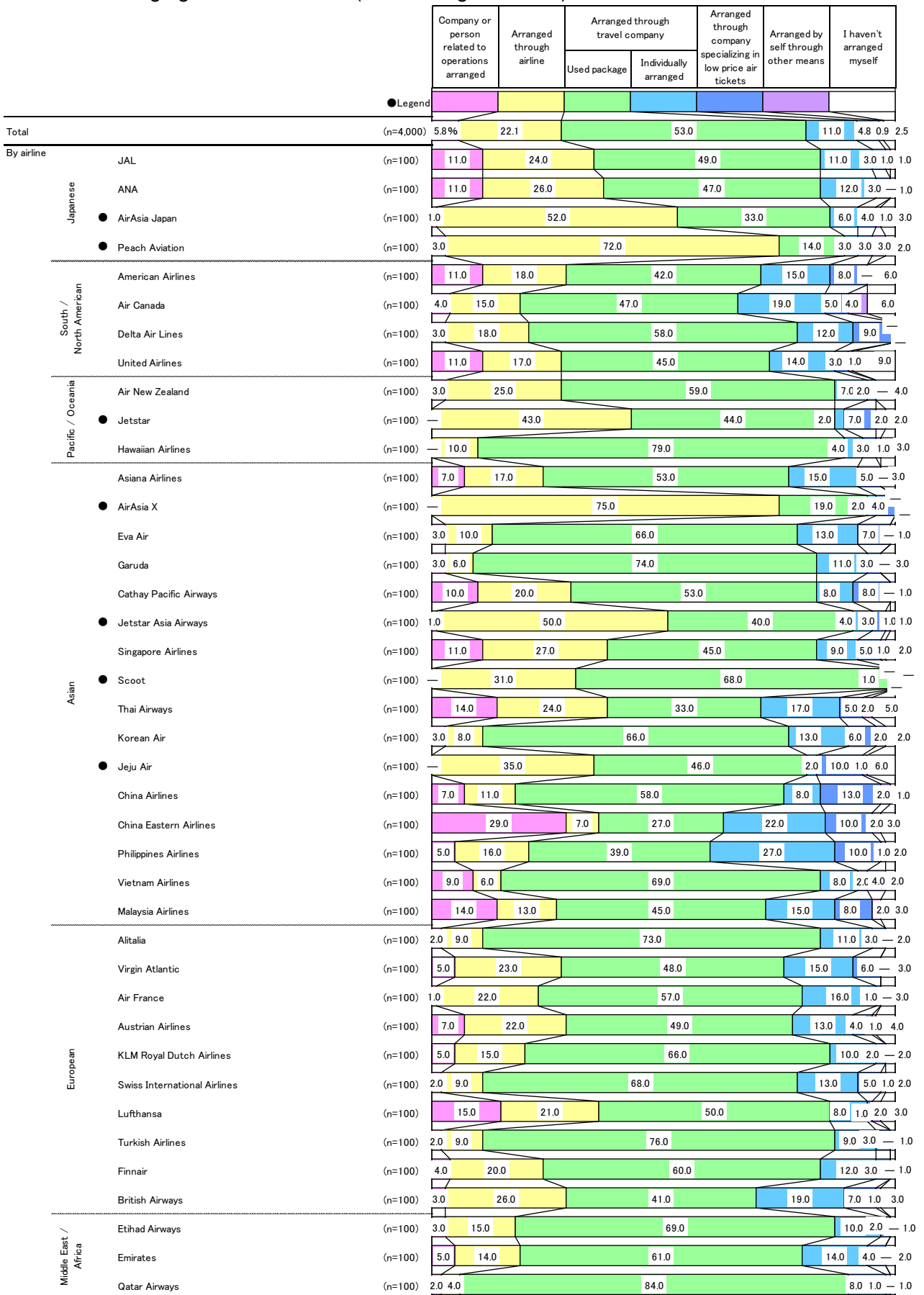


- † [Package] Full package : Tour that is scheduled with sightseeing, activities, and most meals
- [Package] Medium package : Tour that is scheduled with some sightseeing, activities, and meals, as well as tours with some free time
- [Package] Skelton : Tour that basically has free time at destinations, 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)

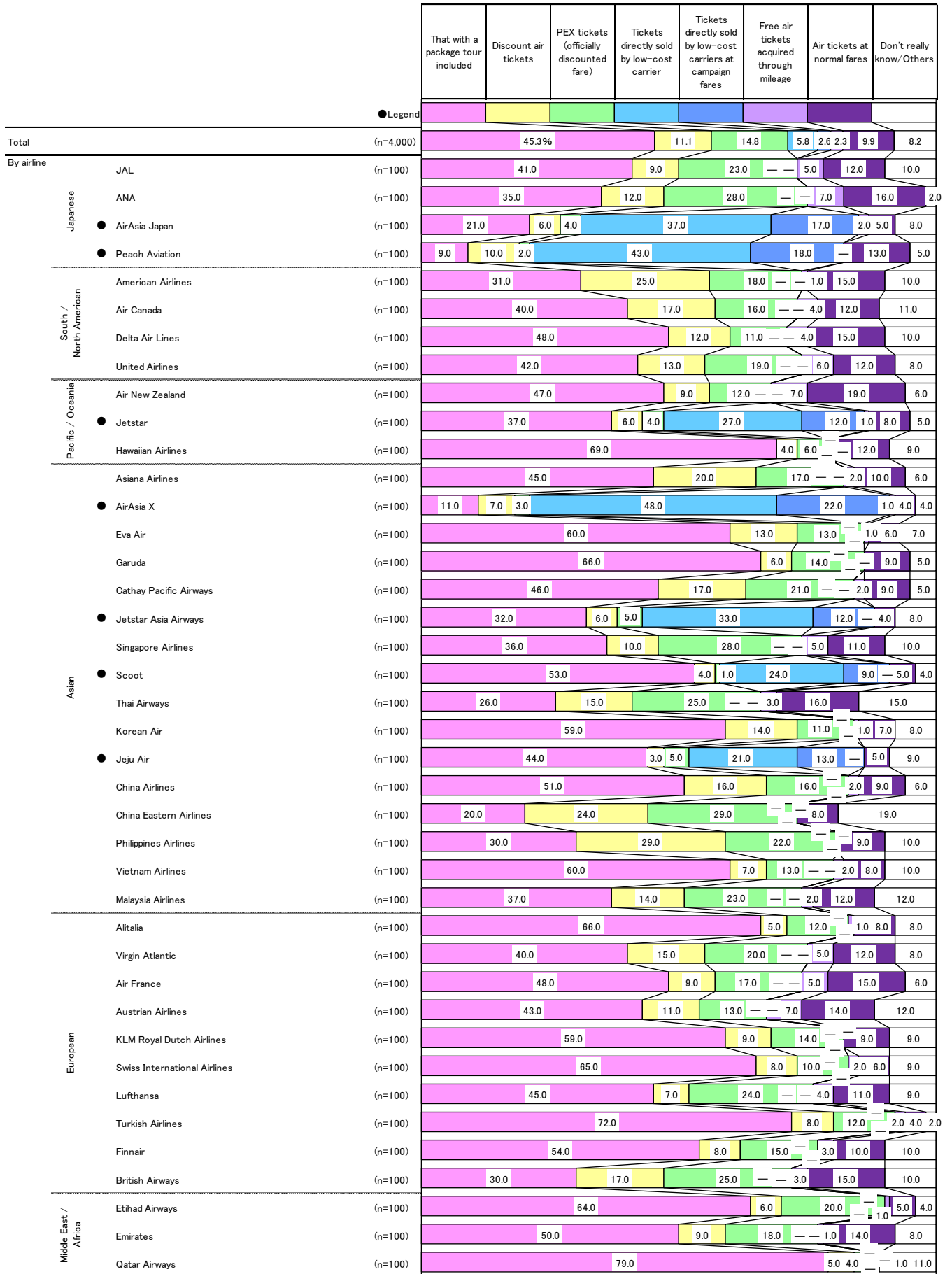


### Means of Arranging Air Tickets Used (Total / Single Answer)



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

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



† ● indicates a low-cost carrier (LCC)



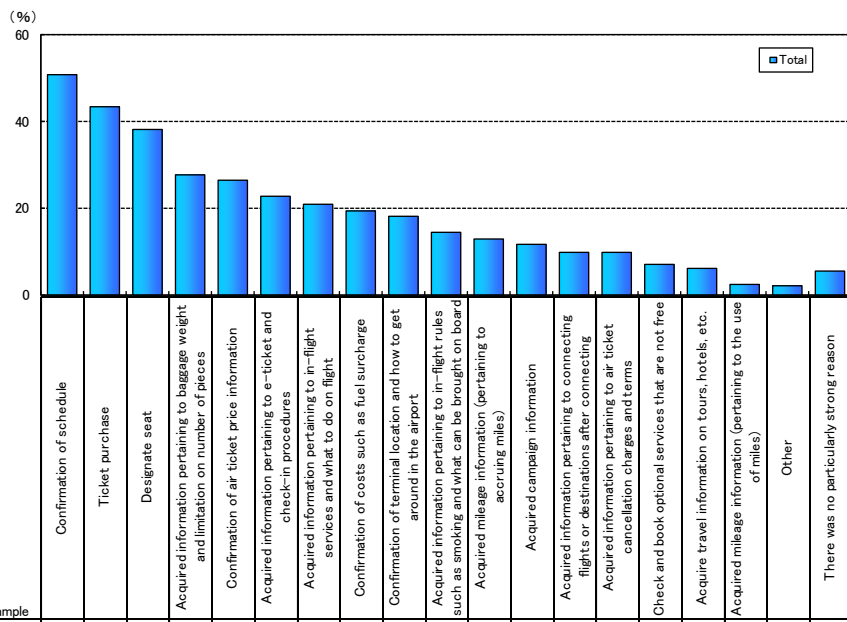
### Whether Airline Website Was Used When Making Overseas Travel (Total / Single Answer)

	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)	58.0%		42.1	51.0	42.2	45.1	
By airline								
● Peach Aviation [Japanese]	(n=100)	96.0		4.0	93.0	93.0	79.0	
● AirAsia X [Asian]	(n=100)	90.0		10.0	89.0	87.0	84.0	
● AirAsia Japan [Japanese]	(n=100)	86.0		14.0	83.0	82.0	72.0	
● Scoot [Asian]	(n=100)	83.0		17.0	76.0	66.0	60.0	
● Jetstar Asia Airways [Asian]	(n=100)	78.0		22.0	72.0	69.0	63.0	
● Jetstar [Pacific / Oceania]	(n=100)	77.0		23.0	71.0	71.0	64.0	
JAL [Japanese]	(n=100)	74.0		26.0	68.0	56.0	56.0	
ANA [Japanese]	(n=100)	72.0		28.0	68.0	60.0	59.0	
● Jeju Air [Asian]	(n=100)	67.0		33.0	59.0	56.0	53.0	
British Airways [European]	(n=100)	67.0		33.0	59.0	52.0	56.0	
Delta Air Lines [South / North American]	(n=100)	62.0		38.0	51.0	39.0	49.0	
Air New Zealand [Pacific / Oceania]	(n=100)	59.0		41.0	53.0	43.0	46.0	
Virgin Atlantic [European]	(n=100)	59.0		41.0	52.0	43.0	43.0	
Air France [European]	(n=100)	59.0		41.0	46.0	34.0	46.0	
Air Canada [South / North American]	(n=100)	57.0		43.0	50.0	44.0	43.0	
Thai Airways [Asian]	(n=100)	55.0		45.0	51.0	41.0	43.0	
Emirates [Middle East / Africa]	(n=100)	55.0		45.0	46.0	30.0	49.0	
Austrian Airlines [European]	(n=100)	55.0		45.0	44.0	39.0	47.0	
Turkish Airlines [European]	(n=100)	55.0		45.0	48.0	28.0	39.0	
Cathay Pacific Airways [Asian]	(n=100)	54.0		46.0	47.0	36.0	45.0	
Singapore Airlines [Asian]	(n=100)	54.0		46.0	50.0	45.0	44.0	
Malaysia Airlines [Asian]	(n=100)	53.0		47.0	51.0	34.0	33.0	
Asiana Airlines [Asian]	(n=100)	52.0		48.0	47.0	40.0	42.0	
Eva Air [Asian]	(n=100)	52.0		48.0	46.0	37.0	32.0	
China Airlines [Asian]	(n=100)	52.0		48.0	46.0	33.0	35.0	
Etihad Airways [Middle East / Africa]	(n=100)	52.0		48.0	46.0	33.0	37.0	
American Airlines [South / North American]	(n=100)	52.0		48.0	45.0	39.0	38.0	
Finnair [European]	(n=100)	51.0		49.0	39.0	34.0	38.0	
Lufthansa [European]	(n=100)	51.0		49.0	41.0	35.0	40.0	
Korean Air [Asian]	(n=100)	50.0		50.0	43.0	33.0	35.0	
Philippines Airlines [Asian]	(n=100)	47.0		53.0	40.0	33.0	35.0	
Swiss International Airlines [European]	(n=100)	47.0		53.0	37.0	23.0	37.0	
United Airlines [South / North American]	(n=100)	47.0		53.0	38.0	26.0	38.0	
Garuda [Asian]	(n=100)	46.0		54.0	40.0	28.0	38.0	
Vietnam Airlines [Asian]	(n=100)	46.0		54.0	40.0	27.0	27.0	
KLM Royal Dutch Airlines [European]	(n=100)	46.0		54.0	35.0	26.0	42.0	
China Eastern Airlines [Asian]	(n=100)	45.0		55.0	40.0	29.0	30.0	
Hawaiian Airlines [Pacific / Oceania]	(n=100)	43.0		57.0	37.0	26.0	30.0	
Alitalia [European]	(n=100)	41.0		59.0	32.0	23.0	31.0	
Qatar Airways [Middle East / Africa]	(n=100)	31.0		69.0	21.0	15.0	26.0	

† 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)

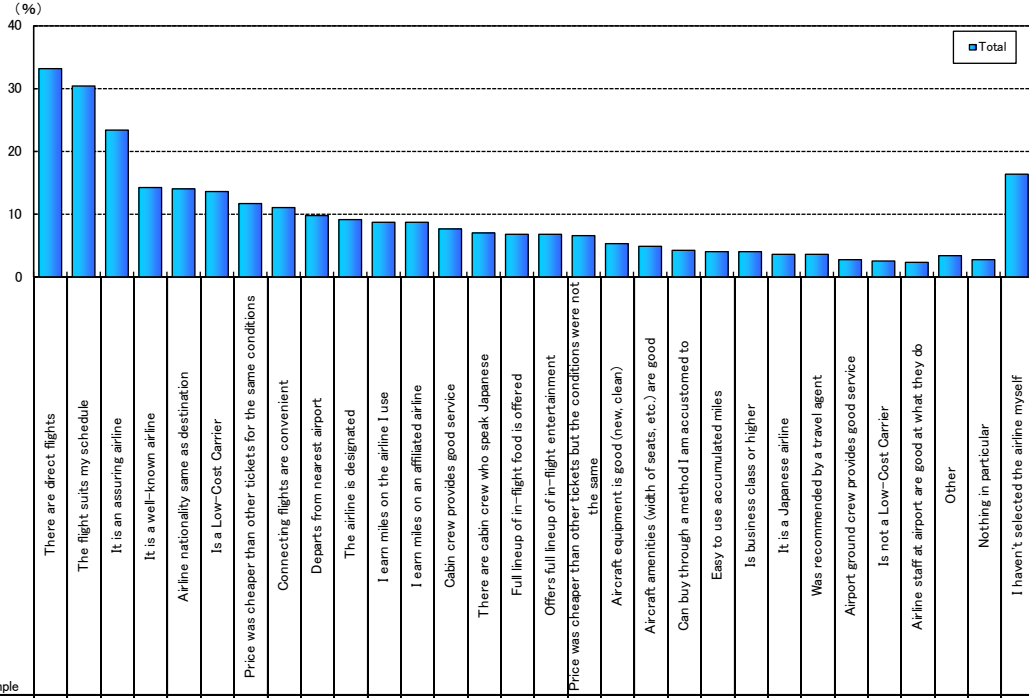
Reason for Using Airline Website (Airline website user / Multiple Answer)



Total		Sample (n=2,318)	51.1	43.7	38.5	27.7	26.7	22.8	21.1	19.5	18.2	14.7	12.9	11.9	9.9	9.8	7.3	6.3	2.4	2.3	5.6
By airline	JAL [Japanese]	(n=74)	59.5	48.6	55.4	9.5	25.7	28.4	12.2	17.6	13.5	6.8	14.9	20.3	5.4	8.1	6.8	12.2	4.1	4.1	6.8
	ANA [Japanese]	(n=72)	61.1	51.4	61.1	22.2	33.3	27.8	12.5	26.4	12.5	11.1	12.5	8.3	2.8	9.7	2.8	12.5	6.9	2.8	5.6
	● AirAsia Japan [Japanese]	(n=86)	52.3	72.1	34.9	30.2	43.0	29.1	16.3	25.6	20.9	19.8	8.1	19.8	9.3	11.6	22.1	4.7	2.3	3.5	3.5
	● Peach Aviation [Japanese]	(n=96)	51.0	78.1	35.4	30.2	46.9	26.0	11.5	17.7	19.8	15.6	—	20.8	4.2	16.7	18.8	5.2	1.0	1.0	5.2
	American Airlines [South / North American]	(n=52)	51.9	40.4	48.1	21.2	23.1	15.4	13.5	19.2	3.8	5.8	17.3	11.5	13.5	15.4	1.9	5.8	—	—	9.6
	Air Canada [South / North American]	(n=57)	45.6	42.1	33.3	26.3	15.8	19.3	24.6	15.8	19.3	17.5	12.3	7.0	8.8	8.8	5.3	1.8	3.5	3.5	3.5
	Delta Air Lines [South / North American]	(n=62)	50.0	35.5	59.7	29.0	30.6	27.4	17.7	16.1	14.5	17.7	22.6	9.7	6.5	6.5	3.2	6.5	11.3	—	—
	United Airlines [South / North American]	(n=47)	57.4	36.2	48.9	19.1	14.9	14.9	21.3	8.5	14.9	10.6	19.1	10.6	12.8	8.5	—	4.3	6.4	—	4.3
	Air New Zealand [Pacific / Oceania]	(n=59)	47.5	37.3	30.5	25.4	20.3	18.6	32.2	22.0	28.8	16.9	11.9	11.9	13.6	13.6	3.4	5.1	1.7	—	3.4
	● Jetstar [Pacific / Oceania]	(n=77)	59.7	72.7	41.6	48.1	40.3	26.0	16.9	35.1	19.5	20.8	1.3	15.6	7.8	15.6	23.4	7.8	1.3	1.3	1.3
	Hawaiian Airlines [Pacific / Oceania]	(n=43)	46.5	30.2	32.6	20.9	2.3	18.6	16.3	9.3	11.6	7.0	14.0	11.6	2.3	7.0	4.7	11.6	—	4.7	11.6
	Asiana Airlines [Asian]	(n=52)	48.1	36.5	28.8	19.2	21.2	13.5	15.4	19.2	15.4	9.6	3.8	9.6	9.6	5.8	3.8	11.5	—	1.9	5.8
	● AirAsia X [Asian]	(n=90)	60.0	87.8	50.0	28.9	42.2	28.9	10.0	26.7	10.0	10.0	2.2	22.2	11.1	5.6	14.4	3.3	—	—	4.4
	Eva Air [Asian]	(n=52)	34.6	26.9	30.8	19.2	9.6	21.2	19.2	13.5	9.6	9.6	9.6	1.9	1.9	5.8	1.9	5.8	—	3.8	5.8
	Garuda [Asian]	(n=46)	58.7	17.4	6.5	30.4	30.4	17.4	21.7	30.4	13.0	19.6	13.0	6.5	8.7	8.7	4.3	13.0	4.3	—	4.3
	Cathay Pacific Airways [Asian]	(n=54)	55.6	38.9	48.1	16.7	27.8	29.6	20.4	16.7	18.5	9.3	9.3	20.4	7.4	9.3	1.9	3.7	—	5.6	1.9
	● Jetstar Asia Airways [Asian]	(n=78)	47.4	70.5	37.2	38.5	44.9	26.9	15.4	33.3	14.1	15.4	2.6	20.5	5.1	19.2	20.5	7.7	1.3	3.8	6.4
	Singapore Airlines [Asian]	(n=54)	51.9	51.9	51.9	16.7	25.9	31.5	22.2	22.2	20.4	7.4	11.1	13.0	16.7	7.4	—	5.6	5.6	1.9	3.7
	● Scoot [Asian]	(n=83)	51.8	48.2	24.1	42.2	33.7	33.7	30.1	31.3	21.7	31.3	8.4	13.3	6.0	20.5	31.3	6.0	1.2	—	7.2
	Thai Airways [Asian]	(n=55)	54.5	43.6	49.1	9.1	43.6	25.5	16.4	23.6	10.9	1.8	9.1	3.6	10.9	10.9	1.8	5.5	—	1.8	5.5
	Korean Air [Asian]	(n=50)	46.0	20.0	22.0	28.0	16.0	12.0	14.0	16.0	22.0	16.0	8.0	10.0	12.0	6.0	—	16.0	—	—	14.0
	● Jeju Air [Asian]	(n=67)	52.2	59.7	35.8	32.8	40.3	23.9	13.4	26.9	13.4	13.4	—	16.4	3.0	16.4	7.5	3.0	—	—	6.0
	China Airlines [Asian]	(n=52)	44.2	26.9	48.1	17.3	17.3	21.2	21.2	11.5	19.2	11.5	13.5	7.7	3.8	5.8	—	3.8	—	3.8	9.6
	China Eastern Airlines [Asian]	(n=45)	48.9	35.6	13.3	15.6	17.8	8.9	11.1	6.7	11.1	8.9	8.9	—	11.1	—	2.2	—	2.2	—	4.4
	Philippines Airlines [Asian]	(n=47)	46.8	36.2	14.9	19.1	25.5	14.9	10.6	19.1	6.4	10.6	14.9	10.6	6.4	10.6	—	6.4	—	2.1	12.8
	Vietnam Airlines [Asian]	(n=46)	45.7	28.3	10.9	26.1	13.0	13.0	15.2	6.5	13.0	17.4	4.3	2.2	8.7	4.3	—	2.2	—	—	15.2
	Malaysia Airlines [Asian]	(n=53)	58.5	30.2	28.3	26.4	22.6	13.2	32.1	11.3	24.5	13.2	7.5	3.8	15.1	7.5	5.7	3.8	—	3.8	1.9
	Alitalia [European]	(n=41)	36.6	26.8	39.0	29.3	17.1	29.3	24.4	19.5	24.4	12.2	12.2	9.8	12.2	9.8	4.9	2.4	4.9	7.3	9.8
	Virgin Atlantic [European]	(n=59)	57.6	42.4	54.2	39.0	22.0	20.3	30.5	16.9	27.1	18.6	32.2	16.9	5.1	6.8	5.1	8.5	1.7	6.8	—
	Air France [European]	(n=59)	49.2	39.0	50.8	37.3	32.2	23.7	23.7	23.7	32.2	15.3	23.7	16.9	15.3	10.2	10.2	13.6	5.1	—	3.4
	Austrian Airlines [European]	(n=55)	58.2	27.3	45.5	30.9	25.5	20.0	32.7	10.9	25.5	18.2	21.8	14.5	18.2	12.7	9.1	10.9	3.6	1.8	1.8
	KLM Royal Dutch Airlines [European]	(n=46)	52.2	37.0	43.5	32.6	26.1	30.4	30.4	23.9	17.4	21.7	30.4	13.0	23.9	8.7	4.3	6.5	8.7	2.2	4.3
	Swiss International Airlines [European]	(n=47)	38.3	25.5	27.7	27.7	12.8	19.1	29.8	14.9	23.4	8.5	25.5	6.4	14.9	8.5	2.1	—	—	6.4	6.4
	Lufthansa [European]	(n=51)	54.9	49.0	49.0	21.6	27.5	19.6	23.5	21.6	21.6	17.6	27.5	9.8	11.8	13.7	2.0	3.9	3.9	5.9	2.0
	Turkish Airlines [European]	(n=55)	49.1	9.1	23.6	32.7	10.9	16.4	29.1	5.5	21.8	23.6	20.0	5.5	9.1	1.8	—	5.5	1.8	1.8	10.9
	Finnair [European]	(n=51)	51.0	37.3	37.3	33.3	17.6	31.4	27.5	11.8	21.6	9.8	13.7	13.7	9.8	7.8	—	5.9	2.0	2.0	3.9
	British Airways [European]	(n=67)	52.2	43.3	46.3	31.3	23.9	19.4	20.9	22.4	23.9	14.9	17.9	6.0	14.9	9.0	4.5	7.5	1.5	3.0	6.0
	Etihad Airways [Middle East / Africa]	(n=52)	50.0	26.9	28.8	36.5	17.3	17.3	32.7	11.5	15.4	13.5	26.9	3.8	11.5	3.8	5.8	3.8	3.8	1.9	7.7
	Emirates [Middle East / Africa]	(n=55)	47.3	29.1	45.5	29.1	16.4	27.3	43.6	16.4	23.6	29.1	18.2	3.6	18.2	7.3	1.8	3.6	5.5	1.8	3.6
	Qatar Airways [Middle East / Africa]	(n=31)	29.0	12.9	32.3	35.5	12.9	19.4	45.2	12.9	32.3	16.1	22.6	12.9	32.3	6.5	—	3.2	—	6.5	9.7

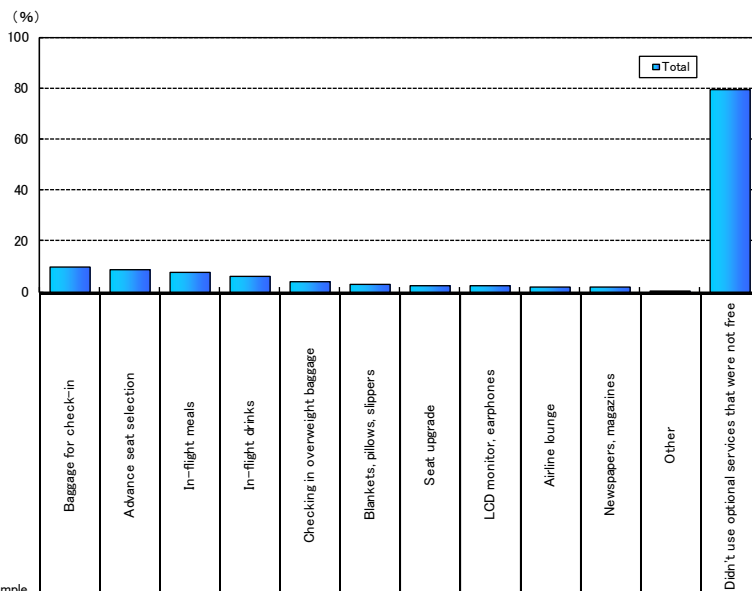
† "●" indicates a low-cost carrier (LCC)

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



Sample																															
Total (n=4,000)		33.2	30.4	23.5	14.2	14.1	13.7	11.7	11.0	9.8	9.2	8.8	8.8	7.6	7.1	6.8	6.8	6.6	5.3	4.9	4.2	4.0	4.0	3.7	3.7	2.7	2.6	2.4	3.3	2.8	16.4
Gender	Male (n=1,931)	33.0	29.7	25.7	15.2	15.4	15.1	11.3	11.9	10.4	8.4	9.7	10.4	9.0	7.7	7.3	6.5	6.9	6.8	5.9	4.7	4.8	5.0	4.6	3.8	3.3	3.5	3.2	3.4	2.8	13.4
	Female (n=2,069)	33.3	31.1	21.3	13.2	12.9	12.3	12.0	10.2	9.2	9.9	8.0	7.4	6.2	6.5	6.3	7.1	6.2	3.9	4.0	3.7	3.2	3.0	2.8	3.6	2.2	1.7	1.7	3.2	2.8	19.3
Age	18-29 yrs (n=449)	26.1	27.2	24.9	16.3	7.6	16.9	12.0	9.1	7.6	6.7	6.5	3.8	3.8	6.5	7.3	6.5	6.9	3.8	2.9	3.3	2.4	2.2	3.3	8.2	1.8	1.3	2.0	1.3	4.0	18.5
	30-39 yrs (n=787)	33.0	36.2	25.7	15.6	11.6	16.9	15.5	9.9	11.9	6.2	8.6	8.9	6.5	6.7	6.7	8.5	8.3	5.6	4.2	4.8	5.1	3.6	3.9	2.5	3.6	1.8	2.5	2.2	1.7	13.5
	40-49 yrs (n=985)	34.9	35.8	24.0	13.2	13.6	16.2	14.6	11.4	9.2	6.5	11.2	9.1	8.0	6.8	6.2	7.0	8.1	4.9	4.2	4.1	4.7	3.5	4.2	3.2	2.3	3.0	2.5	3.7	2.5	11.1
	50 yrs or older (n=1,779)	34.1	25.7	21.8	13.5	17.1	10.0	8.2	11.8	9.7	12.6	8.2	9.9	8.8	7.5	6.9	6.1	4.9	5.7	6.1	4.2	3.5	4.9	3.3	3.4	2.8	3.0	2.4	4.1	3.1	20.2
Area of residence	Kanto (n=2,000)	34.5	30.7	24.6	14.8	15.3	11.3	12.6	10.3	7.4	10.1	9.4	10.3	8.4	6.7	7.4	7.8	6.7	6.0	5.6	3.7	4.6	4.3	3.6	3.4	3.1	3.0	3.1	4.0	2.8	16.7
	Kansai (n=868)	32.0	30.5	20.5	14.2	12.7	17.2	11.4	10.6	13.8	8.3	6.7	7.3	6.0	7.1	4.8	5.4	7.7	4.7	4.4	4.4	3.7	3.7	4.1	3.9	2.0	3.0	1.6	2.9	2.8	16.8
	Tokai (n=465)	28.0	30.1	24.1	10.8	10.8	16.6	11.0	11.4	12.5	8.0	10.1	8.0	5.6	5.6	5.6	5.6	5.8	2.6	2.8	5.4	2.8	2.4	3.2	4.7	1.5	1.5	0.2	2.2	3.0	16.3
Travel type	Package (n=2,120)	28.7	22.0	20.1	13.2	12.4	8.0	5.2	6.4	7.6	15.8	4.9	5.7	6.5	8.3	6.4	6.4	2.5	3.9	3.9	1.2	2.1	2.9	3.3	5.5	2.5	1.8	2.0	2.7	3.3	27.8
	Full package (n=765)	18.3	10.3	18.4	10.8	11.1	4.3	1.4	4.8	5.2	19.3	4.2	7.1	6.9	8.2	6.0	6.4	0.4	3.4	4.2	0.8	1.3	2.5	3.0	6.8	2.1	1.2	1.6	3.1	2.7	39.2
	Medium package (n=556)	29.5	22.5	20.1	12.9	12.9	8.1	4.5	5.6	8.1	15.3	4.9	6.3	5.4	8.6	6.3	5.9	2.2	3.1	2.7	0.9	2.5	2.5	3.6	5.6	2.7	1.3	1.8	1.6	4.0	26.1
	Skelton (n=799)	38.2	32.8	21.7	15.5	13.3	11.5	9.3	8.5	9.5	12.6	5.5	4.0	6.8	8.3	6.8	6.6	4.9	4.9	4.4	1.9	2.5	3.5	3.4	4.3	2.9	2.9	2.6	3.0	3.4	18.0
FIT (n=1,784)	38.2	41.0	27.3	15.3	15.8	20.5	19.2	16.4	12.3	1.7	13.1	12.6	8.8	5.4	7.3	7.5	11.5	6.9	6.1	7.5	6.4	5.2	4.1	1.7	3.0	3.4	2.9	3.8	2.2	2.8	
Accompanying traveler	Travel alone (n=598)	34.9	33.6	23.7	14.4	15.6	22.7	19.2	13.4	11.9	5.4	12.5	12.5	6.9	6.5	7.0	7.2	10.7	5.9	5.2	8.5	5.9	4.2	4.5	1.7	2.5	3.5	2.8	3.8	1.7	9.9
	Married couple / Couple / Honeymoon (n=1,194)	29.7	27.0	22.1	14.6	14.0	10.9	10.0	10.6	9.1	11.6	7.1	8.2	7.8	8.2	6.4	6.0	5.4	4.9	4.7	2.8	3.9	4.9	3.1	4.5	2.5	2.0	2.1	3.4	2.2	22.0
	With friend (n=686)	32.2	27.4	19.7	12.0	10.9	16.0	10.8	7.7	8.7	11.2	4.8	5.1	5.2	6.7	5.5	5.8	7.0	3.9	3.1	3.1	2.0	1.2	2.3	4.4	2.3	1.5	1.6	3.1	3.5	17.3
	Family travel (n=703)	37.1	32.0	26.0	14.8	15.9	13.1	10.7	10.0	11.0	12.1	9.5	7.4	8.5	8.1	8.7	9.0	4.7	5.3	5.0	3.4	4.0	3.6	5.0	3.8	3.0	2.6	2.3	3.3	3.6	13.7
Travel class	Is business class or higher (n=424)	35.6	34.4	35.8	20.3	24.1	5.2	7.3	15.1	10.4	5.7	17.0	17.2	17.9	7.1	16.0	10.8	4.2	12.3	15.8	5.7	12.7	35.6	7.1	2.1	6.4	5.0	5.7	3.5	1.9	7.1
	Economy class (n=3,576)	32.9	29.9	22.0	13.5	12.9	14.7	12.2	10.5	9.7	9.6	7.8	7.8	6.3	7.0	5.6	6.3	6.9	4.4	3.6	4.0	2.9	0.2	3.2	3.9	2.3	2.3	2.0	3.3	2.9	17.5

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



		Sample	Baggage for check-in	Advance seat selection	In-flight meals	In-flight drinks	Checking in overweight baggage	Blankets, pillows, slippers	Seat upgrade	LCD monitor, earphones	Airline lounge	Newspapers, magazines	Other	Didn't use optional services that were not free
Total		(n=4,000)	10.0	9.0	7.9	6.1	4.0	3.3	2.6	2.5	2.2	2.0	0.3	79.5
By airline	JAL [Japanese]	(n=100)	7.0	7.0	7.0	8.0	2.0	—	2.0	1.0	3.0	2.0	—	86.0
	ANA [Japanese]	(n=100)	10.0	9.0	9.0	7.0	—	3.0	1.0	2.0	5.0	6.0	—	82.0
	● AirAsia Japan [Japanese]	(n=100)	33.0	23.0	27.0	11.0	12.0	5.0	5.0	2.0	1.0	1.0	—	41.0
	● Peach Aviation [Japanese]	(n=100)	33.0	30.0	16.0	14.0	4.0	4.0	5.0	4.0	1.0	1.0	2.0	42.0
	American Airlines [South / North American]	(n=100)	13.0	10.0	8.0	9.0	6.0	6.0	4.0	5.0	1.0	4.0	1.0	76.0
	Air Canada [South / North American]	(n=100)	6.0	5.0	1.0	3.0	2.0	2.0	—	1.0	1.0	1.0	—	90.0
	Delta Air Lines [South / North American]	(n=100)	3.0	6.0	1.0	—	1.0	—	4.0	1.0	—	—	1.0	91.0
	United Airlines [South / North American]	(n=100)	4.0	6.0	6.0	5.0	3.0	2.0	6.0	2.0	7.0	2.0	1.0	80.0
	Air New Zealand [Pacific / Oceania]	(n=100)	8.0	4.0	6.0	5.0	9.0	1.0	7.0	2.0	3.0	—	—	74.0
	● Jetstar [Pacific / Oceania]	(n=100)	29.0	26.0	29.0	13.0	24.0	14.0	4.0	7.0	1.0	—	—	39.0
	Hawaiian Airlines [Pacific / Oceania]	(n=100)	1.0	1.0	3.0	3.0	1.0	2.0	—	1.0	—	1.0	—	94.0
	Asiana Airlines [Asian]	(n=100)	9.0	7.0	9.0	8.0	3.0	3.0	1.0	3.0	4.0	2.0	—	81.0
	● AirAsia X [Asian]	(n=100)	38.0	48.0	46.0	16.0	21.0	5.0	4.0	3.0	4.0	1.0	—	25.0
	Eva Air [Asian]	(n=100)	8.0	5.0	7.0	5.0	2.0	1.0	—	2.0	1.0	3.0	—	90.0
	Garuda [Asian]	(n=100)	4.0	3.0	4.0	3.0	1.0	2.0	1.0	3.0	2.0	1.0	—	92.0
	Cathay Pacific Airways [Asian]	(n=100)	3.0	5.0	5.0	4.0	1.0	3.0	1.0	2.0	1.0	3.0	—	91.0
	● Jetstar Asia Airways [Asian]	(n=100)	30.0	30.0	24.0	17.0	16.0	7.0	4.0	4.0	4.0	2.0	1.0	37.0
	Singapore Airlines [Asian]	(n=100)	7.0	4.0	5.0	7.0	2.0	1.0	1.0	2.0	2.0	1.0	1.0	86.0
	● Scoot [Asian]	(n=100)	29.0	23.0	24.0	19.0	8.0	5.0	9.0	6.0	4.0	1.0	—	43.0
	Thai Airways [Asian]	(n=100)	5.0	5.0	1.0	1.0	3.0	—	1.0	—	2.0	1.0	—	90.0
	Korean Air [Asian]	(n=100)	7.0	5.0	4.0	6.0	3.0	5.0	1.0	3.0	1.0	3.0	—	87.0
	● Jeju Air [Asian]	(n=100)	3.0	5.0	3.0	7.0	2.0	—	—	—	—	2.0	1.0	85.0
	China Airlines [Asian]	(n=100)	3.0	2.0	2.0	3.0	—	2.0	—	2.0	1.0	1.0	—	96.0
	China Eastern Airlines [Asian]	(n=100)	7.0	3.0	—	3.0	—	1.0	—	1.0	1.0	2.0	—	91.0
	Philippines Airlines [Asian]	(n=100)	7.0	5.0	5.0	5.0	2.0	6.0	—	4.0	1.0	3.0	—	89.0
	Vietnam Airlines [Asian]	(n=100)	9.0	7.0	7.0	4.0	—	6.0	—	4.0	5.0	4.0	—	87.0
	Malaysia Airlines [Asian]	(n=100)	9.0	11.0	6.0	5.0	2.0	5.0	2.0	3.0	3.0	2.0	—	81.0
	Alitalia [European]	(n=100)	6.0	7.0	2.0	2.0	1.0	3.0	8.0	1.0	1.0	1.0	1.0	84.0
	Virgin Atlantic [European]	(n=100)	9.0	6.0	1.0	2.0	6.0	2.0	10.0	1.0	2.0	3.0	—	75.0
	Air France [European]	(n=100)	6.0	7.0	6.0	6.0	3.0	1.0	4.0	1.0	1.0	—	—	83.0
	Austrian Airlines [European]	(n=100)	10.0	9.0	8.0	9.0	6.0	4.0	3.0	4.0	4.0	7.0	—	85.0
	KLM Royal Dutch Airlines [European]	(n=100)	5.0	5.0	5.0	4.0	1.0	2.0	8.0	2.0	1.0	3.0	—	85.0
	Swiss International Airlines [European]	(n=100)	3.0	3.0	3.0	2.0	3.0	2.0	—	1.0	2.0	—	—	91.0
	Lufthansa [European]	(n=100)	3.0	1.0	4.0	3.0	2.0	6.0	2.0	4.0	4.0	4.0	—	90.0
	Turkish Airlines [European]	(n=100)	2.0	4.0	3.0	4.0	1.0	3.0	2.0	2.0	1.0	2.0	—	93.0
	Finnair [European]	(n=100)	6.0	5.0	4.0	4.0	1.0	3.0	1.0	3.0	2.0	3.0	—	92.0
	British Airways [European]	(n=100)	9.0	10.0	7.0	7.0	2.0	6.0	2.0	2.0	3.0	1.0	—	81.0
	Ethiad Airways [Middle East / Africa]	(n=100)	2.0	—	1.0	1.0	—	2.0	1.0	2.0	—	—	1.0	96.0
	Emirates [Middle East / Africa]	(n=100)	10.0	4.0	5.0	6.0	3.0	5.0	—	5.0	4.0	3.0	—	85.0
	Qatar Airways [Middle East / Africa]	(n=100)	3.0	2.0	2.0	1.0	1.0	2.0	—	2.0	2.0	2.0	—	94.0

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

## **Part 2: Airline Evaluations**



# 1. Overall Satisfaction: Top 20

- The overall satisfaction total average was 3.72 points.
- As was the case last year, the top spot went to Singapore Airlines (4.26 points), second place was ANA (4.21 points). This was followed by JAL (4.13 points).
- British Airways increased its score to 3.88 points and went up the rankings sharply from 26th place last year to 11th place this year.

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

					Am satisfied	More satisfied than not	Can't say either way	More dissatisfied than not	Am dissatisfied			
					● Legend							
Order this year	Order last year	Changes in order								Satisfaction points	Satisfaction points last year	
<b>Total</b>					(n=4,000)	15.0%	53.5	22.5	7.1	2.0	3.72	3.77
<b>By airline</b>												
1	(1)	-	Singapore Airlines [Asian]	(n=100)	38.0	54.0	5.0	2.0	1.0	4.26	4.34	
2	(5)	↑	ANA [Japanese]	(n=100)	33.0	56.0	10.0	1.0	1.0	4.21	4.08	
3	(3)	-	JAL [Japanese]	(n=100)	34.0	48.0	15.0	3.0	1.0	4.13	4.16	
4	(4)	-	Turkish Airlines [European]	(n=100)	22.0	68.0	8.0	2.0	1.0	4.10	4.10	
5	(2)	↓	Emirates [Middle East / Africa]	(n=100)	25.0	60.0	10.0	4.0	1.0	4.04	4.26	
6	(6)	-	Eva Air [Asian]	(n=100)	22.0	58.0	19.0	1.0	1.0	4.01	4.07	
7	(11)	↑	Swiss International Airlines [European]	(n=100)	22.0	60.0	12.0	5.0	1.0	3.97	3.99	
8	*	*	Air New Zealand [Pacific / Oceania]	(n=100)	20.0	60.0	16.0	3.0	1.0	3.95	*	
8	(12)	↑	Lufthansa [European]	(n=100)	21.0	57.0	19.0	2.0	1.0	3.95	3.98	
10	(7)	↓	Qatar Airways [Middle East / Africa]	(n=100)	19.0	57.0	20.0	4.0	1.0	3.91	4.05	
11	(26)	↑	British Airways [European]	(n=100)	16.0	60.0	20.0	4.0	1.0	3.88	3.69	
12	(16)	↑	Virgin Atlantic [European]	(n=100)	19.0	58.0	16.0	4.0	3.0	3.86	3.88	
12	(8)	↓	Ethad Airways [Middle East / Africa]	(n=100)	23.0	49.0	22.0	3.0	3.0	3.86	4.04	
14	(12)	↓	Thai Airways [Asian]	(n=100)	14.0	59.0	25.0	1.0	1.0	3.84	3.98	
15	(24)	↑	Asiana Airlines [Asian]	(n=100)	14.0	59.0	23.0	4.0	1.0	3.83	3.74	
16	(9)	↓	KLM Royal Dutch Airlines [European]	(n=100)	12.0	62.0	20.0	6.0	1.0	3.80	4.02	
17	(20)	↑	Air France [European]	(n=100)	14.0	59.0	20.0	6.0	1.0	3.79	3.80	
17	(18)	↑	Austrian Airlines [European]	(n=100)	15.0	59.0	19.0	4.0	3.0	3.79	3.83	
19	(25)	↑	Garuda [Asian]	(n=100)	8.0	67.0	20.0	5.0	1.0	3.78	3.72	
19	(12)	↓	Finnair [European]	(n=100)	15.0	57.0	20.0	7.0	1.0	3.78	3.98	

† 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.  
 † 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 3.57 points.
- Rising impressively from 6th place last year to the top spot this year was ANA (4.13 points). This was followed by Singapore Airlines (4.10 points) and Emirates (4.05 points).
- British Airways increased its figure to 3.76 points, moving up dramatically in the ranking from 25<sup>th</sup> last year to 9<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)

		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	Satisfaction points	Satisfaction points last year	
● Legend													
Total (n=4,000)						12.7%	44.8		31.4	9.2	2.0	3.57	3.59
By airline	1	(6)	↑	ANA [Japanese]	(n=100)	26.0	62.0		11.0	1.0	4.13	3.86	
	2	(1)	↓	Singapore Airlines [Asian]	(n=100)	30.0	55.0		11.0	3.0	4.10	4.20	
	3	(1)	↓	Emirates [Middle East / Africa]	(n=100)	31.0	49.0		16.0	2.0	4.05	4.20	
	4	(9)	↑	JAL [Japanese]	(n=100)	28.0	48.0		22.0	2.0	4.02	3.82	
	5	(5)	-	Lufthansa [European]	(n=100)	25.0	47.0		25.0	3.0	3.94	3.89	
	6	*	*	Air New Zealand [Pacific / Oceania]	(n=100)	20.0	55.0		22.0	3.0	3.92	*	
	7	(4)	↓	Turkish Airlines [European]	(n=100)	20.0	52.0		23.0	5.0	3.87	3.90	
	8	(7)	↓	Eva Air [Asian]	(n=100)	17.0	53.0		27.0	2.0	3.83	3.85	
	9	(25)	↑	British Airways [European]	(n=100)	16.0	52.0		25.0	6.0	3.76	3.50	
	10	(3)	↓	Ethiad Airways [Middle East / Africa]	(n=100)	22.0	45.0		23.0	6.0	3.75	4.05	
	10	(10)	-	Swiss International Airlines [European]	(n=100)	14.0	53.0		27.0	6.0	3.75	3.81	
	12	(7)	↓	Qatar Airways [Middle East / Africa]	(n=100)	13.0	53.0		28.0	4.0	3.71	3.85	
	13	(16)	↑	Cathay Pacific Airways [Asian]	(n=100)	17.0	44.0		31.0	8.0	3.70	3.67	
	13	(28)	↑	Austrian Airlines [European]	(n=100)	16.0	48.0		28.0	6.0	3.70	3.46	
	15	(14)	↓	Air France [European]	(n=100)	11.0	57.0		22.0	9.0	3.68	3.72	
	16	*	*	● Scoot [Asian]	(n=100)	16.0	45.0		30.0	5.0	3.64	*	
	16	(12)	↓	Thai Airways [Asian]	(n=100)	9.0	54.0		30.0	6.0	3.64	3.76	
	18	(20)	↑	Asiana Airlines [Asian]	(n=100)	10.0	49.0		36.0	4.0	3.63	3.60	
	18	(21)	↑	Virgin Atlantic [European]	(n=100)	10.0	57.0		20.0	12.0	3.63	3.58	
	20	(15)	↓	Hawaiian Airlines [Pacific / Oceania]	(n=100)	12.0	48.0		29.0	9.0	3.59	3.69	
	20	(13)	↓	Finnair [European]	(n=100)	8.0	48.0		39.0	5.0	3.59	3.75	

† 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 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	2,297	35.0	35.0	25.2	20.8	11.4	1.2	26.2
Reasons for dissatisfaction	1,703	15.8	34.9	7.5	14.3	9.9	2.6	39.9

† "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

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

- The total average of satisfaction with the "service by cabin crew" was 3.65 points.
- At 4.27 points, ANA went from 4th place last year to the top spot this year. This was followed by Singapore Airlines (4.12 points) and JAL (4.06 points).
- The top reason for satisfaction and reason for dissatisfaction were both "Courtesy of response."
- Hawaiian Airlines and British Airways both extended their scores to 3.85 points to dramatically increase their ranking from 25th place last year to 10th this year.

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

		Order this year	Order last year	Changes in order		Legend	Am satisfied	More satisfied than not	Can't say either way	More dissatisfied than not	Am dissatisfied	Satisfaction points	Satisfaction points last year
Total						(n=4,000)	13.8%	47.7	30.4	6.4	1.8	3.65	3.67
By airline	1	(4)	↑	ANA [Japanese]	(n=100)	38.0	52.0	9.0	1.0	—	—	4.27	4.05
	2	(1)	↓	Singapore Airlines [Asian]	(n=100)	34.0	49.0	13.0	3.0	1.0	—	4.12	4.20
	3	(3)	—	JAL [Japanese]	(n=100)	32.0	44.0	23.0	—	1.0	—	4.06	4.12
	4	*	*	Air New Zealand [Pacific / Oceania]	(n=100)	19.0	60.0	16.0	5.0	—	—	3.93	*
	4	(5)	↑	Swiss International Airlines [European]	(n=100)	19.0	59.0	19.0	2.0	1.0	—	3.93	3.97
	6	(2)	↓	Emirates [Middle East / Africa]	(n=100)	17.0	58.0	22.0	2.0	1.0	—	3.88	4.14
	6	(10)	↑	Turkish Airlines [European]	(n=100)	15.0	60.0	23.0	2.0	—	—	3.88	3.92
	8	(7)	↓	Eva Air [Asian]	(n=100)	18.0	52.0	28.0	2.0	—	—	3.86	3.96
	8	(14)	↑	Lufthansa [European]	(n=100)	21.0	48.0	27.0	4.0	—	—	3.86	3.83
	10	(25)	↑	Hawaiian Airlines [Pacific / Oceania]	(n=100)	16.0	59.0	21.0	2.0	2.0	—	3.85	3.63
	10	(11)	↑	Ethihad Airways [Middle East / Africa]	(n=100)	24.0	46.0	24.0	3.0	3.0	—	3.85	3.89
	10	(25)	↑	British Airways [European]	(n=100)	16.0	55.0	27.0	2.0	—	—	3.85	3.63
	13	(12)	↓	Austrian Airlines [European]	(n=100)	18.0	55.0	21.0	5.0	1.0	—	3.84	3.84
	14	(15)	↑	Qatar Airways [Middle East / Africa]	(n=100)	16.0	54.0	27.0	3.0	—	—	3.83	3.78
	15	(8)	↓	Finnair [European]	(n=100)	18.0	47.0	31.0	3.0	1.0	—	3.78	3.95
	16	(17)	↑	Asiana Airlines [Asian]	(n=100)	13.0	55.0	28.0	4.0	—	—	3.77	3.77
	17	(22)	↑	Virgin Atlantic [European]	(n=100)	13.0	56.0	24.0	6.0	1.0	—	3.74	3.66
	17	(17)	—	Air France [European]	(n=100)	10.0	62.0	21.0	6.0	1.0	—	3.74	3.77
	19	(5)	↓	KLM Royal Dutch Airlines [European]	(n=100)	11.0	55.0	31.0	2.0	1.0	—	3.73	3.97
	20	(24)	↑	Cathay Pacific Airways [Asian]	(n=100)	13.0	51.0	31.0	5.0	—	—	3.72	3.65

† 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 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	2,458	23.5	55.8	23.4	16.0	1.7	21.3
Reasons for dissatisfaction	1,542	10.6	29.8	10.4	6.3	3.5	51.6

† "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."

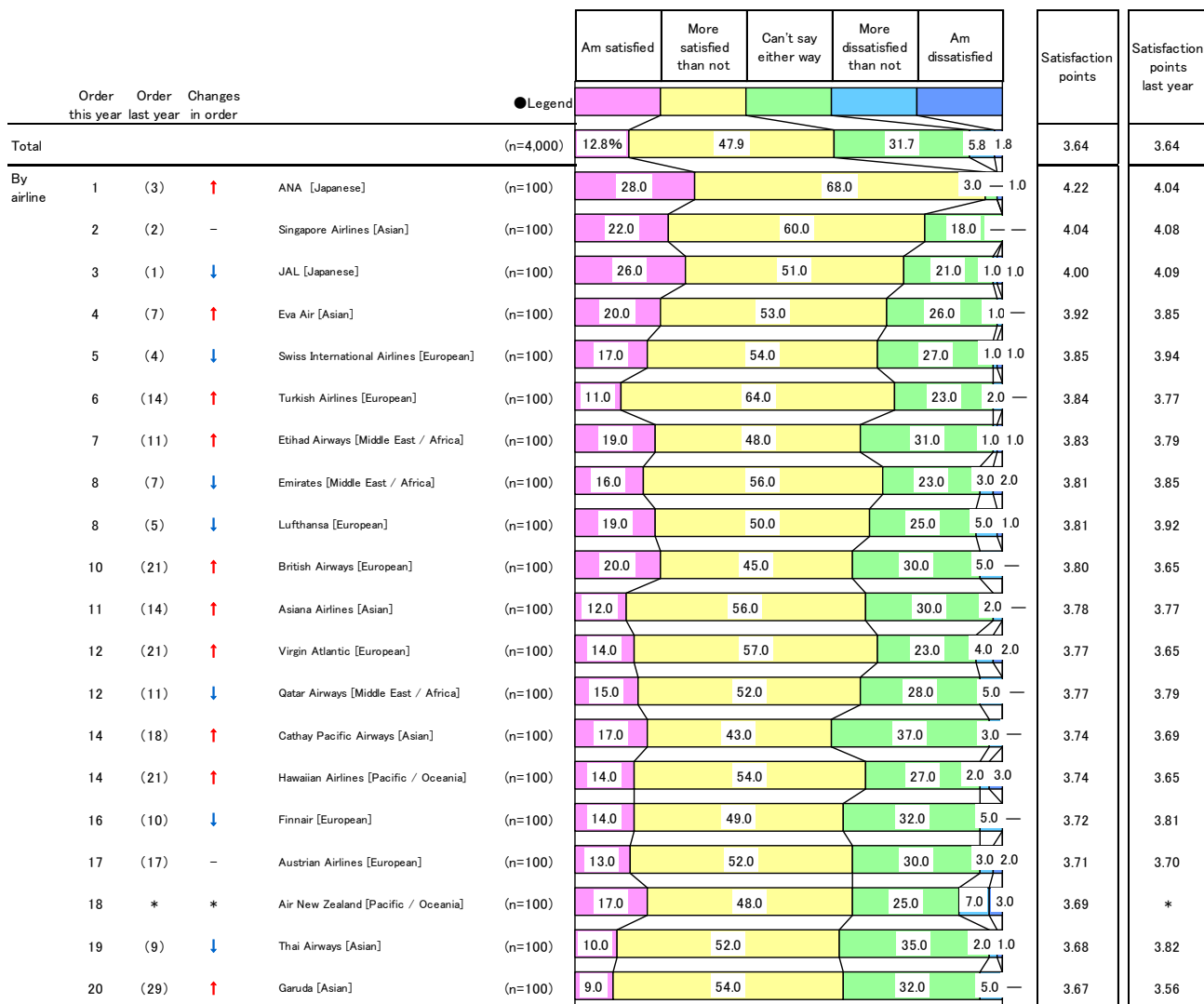


## 2. Satisfaction by Attribute

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

- The total average of satisfaction with the "service by ground crew" was 3.64 points.
- At 4.22 points, ANA went from 3rd place last year to the top spot this year. This was followed by Singapore Airlines (4.04 points) and JAL (4.00 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.  
 † 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	2,427	61.0	28.1	13.6	6.6	1.3	27.0
Reasons for dissatisfaction	1,573	24.9	14.2	6.5	4.3	2.9	56.3

† "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

### 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 4.07 points. Second place was taken over by ANA (4.03 points), which increased significantly from 14th place last year. Turkish Airlines followed in 3rd place (3.99 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)

				● 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=3,387)				14.6%	47.3	26.8	8.8	2.6	3.63	3.63
By airline										
1	(1)	-	Singapore Airlines [Asian]	(n=100)	27.0	55.0	16.0	2.0	4.07	4.18
2	(14)	↑	ANA [Japanese]	(n=100)	26.0	56.0	14.0	3.0	4.03	3.75
3	(5)	↑	Turkish Airlines [European]	(n=100)	22.0	60.0	14.0	3.0	3.99	3.94
4	(2)	↓	Emirates [Middle East / Africa]	(n=100)	24.0	54.0	16.0	3.0	3.93	4.06
4	(13)	↑	JAL [Japanese]	(n=100)	27.0	44.0	24.0	5.0	3.93	3.78
6	*	*	Air New Zealand [Pacific / Oceania]	(n=100)	21.0	54.0	21.0	4.0	3.92	*
7	(9)	↑	Swiss International Airlines [European]	(n=100)	18.0	60.0	16.0	5.0	3.89	3.84
8	(3)	↓	Etihad Airways [Middle East / Africa]	(n=100)	26.0	44.0	22.0	5.0	3.85	3.97
9	(8)	↓	Lufthansa [European]	(n=100)	19.0	52.0	20.0	8.0	3.80	3.86
10	(9)	↓	Eva Air [Asian]	(n=100)	21.0	46.0	22.0	11.0	3.77	3.84
10	(4)	↓	KLM Royal Dutch Airlines [European]	(n=100)	14.0	58.0	19.0	9.0	3.77	3.95
10	(6)	↓	Air France [European]	(n=100)	15.0	57.0	18.0	10.0	3.77	3.92
13	(6)	↓	Qatar Airways [Middle East / Africa]	(n=100)	17.0	51.0	23.0	8.0	3.75	3.92
14	(11)	↓	Austrian Airlines [European]	(n=100)	18.0	50.0	21.0	8.0	3.72	3.79
15	(19)	↑	British Airways [European]	(n=100)	17.0	42.0	36.0	3.0	3.69	3.64
16	(21)	↑	Cathay Pacific Airways [Asian]	(n=100)	14.0	46.0	33.0	6.0	3.66	3.63
16	(16)	-	Thai Airways [Asian]	(n=100)	10.0	59.0	21.0	7.0	3.66	3.71
18	(23)	↑	Hawaiian Airlines [Pacific / Oceania]	(n=100)	14.0	47.0	29.0	8.0	3.63	3.61
18	(17)	↓	Virgin Atlantic [European]	(n=100)	12.0	54.0	21.0	11.0	3.63	3.70
20	(11)	↓	Malaysia Airlines [Asian]	(n=100)	10.0	49.0	33.0	7.0	3.60	3.79

† 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 were people who did not use the in-flight meal service on low-cost carriers (LLCs), Jetstar Asia Airways, Scoot Airlines, Jeju Air, Jetstar, AirAsia Japan, and Peach Aviation ended up with less than 80s users and were therefore excluded from the tabulations.  
 † 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	2,095	63.9	42.8	27.1	34.1	31.9	34.1	1.0	5.0
Reasons for dissatisfaction	1,292	56.9	11.3	10.4	5.8	6.3	11.9	3.0	24.1

† "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."

## 2. Satisfaction by Attribute

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

- The total average of satisfaction with "in-flight entertainment" was 3.42 points.
- With 4.03 points, Emirates moved from second place last year to first this year. This was followed by Singapore Airlines (4.02 points) and JAL (3.99 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)

				● 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=3,551)	11.7%	38.9	32.0	14.2	3.3	3.42	3.44
By airline											
1	(2)	↑	Emirates [Middle East / Africa]	(n=100)	30.0	52.0	10.0	7.0	1.0	4.03	4.06
2	(1)	↓	Singapore Airlines [Asian]	(n=100)	31.0	45.0	19.0	5.0	—	4.02	4.09
3	(4)	↑	JAL [Japanese]	(n=100)	31.0	39.0	28.0	2.0	—	3.99	3.83
4	(8)	↑	ANA [Japanese]	(n=100)	22.0	56.0	17.0	4.0	1.0	3.94	3.67
5	*	*	Air New Zealand [Pacific / Oceania]	(n=100)	19.0	54.0	19.0	8.0	—	3.84	*
6	(7)	↑	Virgin Atlantic [European]	(n=100)	18.0	51.0	23.0	7.0	1.0	3.78	3.72
7	(3)	↓	Qatar Airways [Middle East / Africa]	(n=100)	18.0	46.0	27.0	8.0	1.0	3.72	3.95
8	(10)	↑	Eva Air [Asian]	(n=100)	14.0	48.0	31.0	5.0	2.0	3.67	3.62
8	(9)	↑	Air France [European]	(n=100)	11.0	55.0	24.0	10.0	—	3.67	3.65
8	(5)	↓	Turkish Airlines [European]	(n=100)	12.0	52.0	28.0	7.0	1.0	3.67	3.77
11	(15)	↑	Lufthansa [European]	(n=100)	14.0	43.0	31.0	11.0	1.0	3.58	3.52
12	(12)	—	Thai Airways [Asian]	(n=100)	13.0	40.0	37.0	9.0	1.0	3.55	3.61
12	(19)	↑	British Airways [European]	(n=100)	14.0	36.0	41.0	9.0	—	3.55	3.48
14	(29)	↑	Austrian Airlines [European]	(n=100)	11.0	47.0	30.0	8.0	4.0	3.53	3.15
15	(6)	↓	Etihad Airways [Middle East / Africa]	(n=100)	17.0	36.0	31.0	12.0	4.0	3.50	3.73
15	(15)	—	Swiss International Airlines [European]	(n=100)	10.0	43.0	35.0	11.0	1.0	3.50	3.52
15	(32)	↑	Delta Air Lines [South / North American]	(n=100)	13.0	44.0	25.0	16.0	2.0	3.50	3.03
18	(25)	↑	Asiana Airlines [Asian]	(n=100)	8.0	42.0	36.0	13.0	1.0	3.43	3.30
18	(21)	↑	Garuda [Asian]	(n=100)	8.0	42.0	35.0	15.0	—	3.43	3.40
20	(18)	↓	Cathay Pacific Airways [Asian]	(n=100)	12.0	41.0	28.0	14.0	5.0	3.41	3.49
20	(10)	↓	KLM Royal Dutch Airlines [European]	(n=100)	11.0	36.0	37.0	15.0	1.0	3.41	3.62

† 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 were people who did not use the in-flight entertainment service on low-cost carriers (LLCs), AirAsia X, Scoot Airlines, AirAsia Japan, and Peach Aviation ended up with less than 80s users and were therefore excluded from the tabulations.  
 † 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)

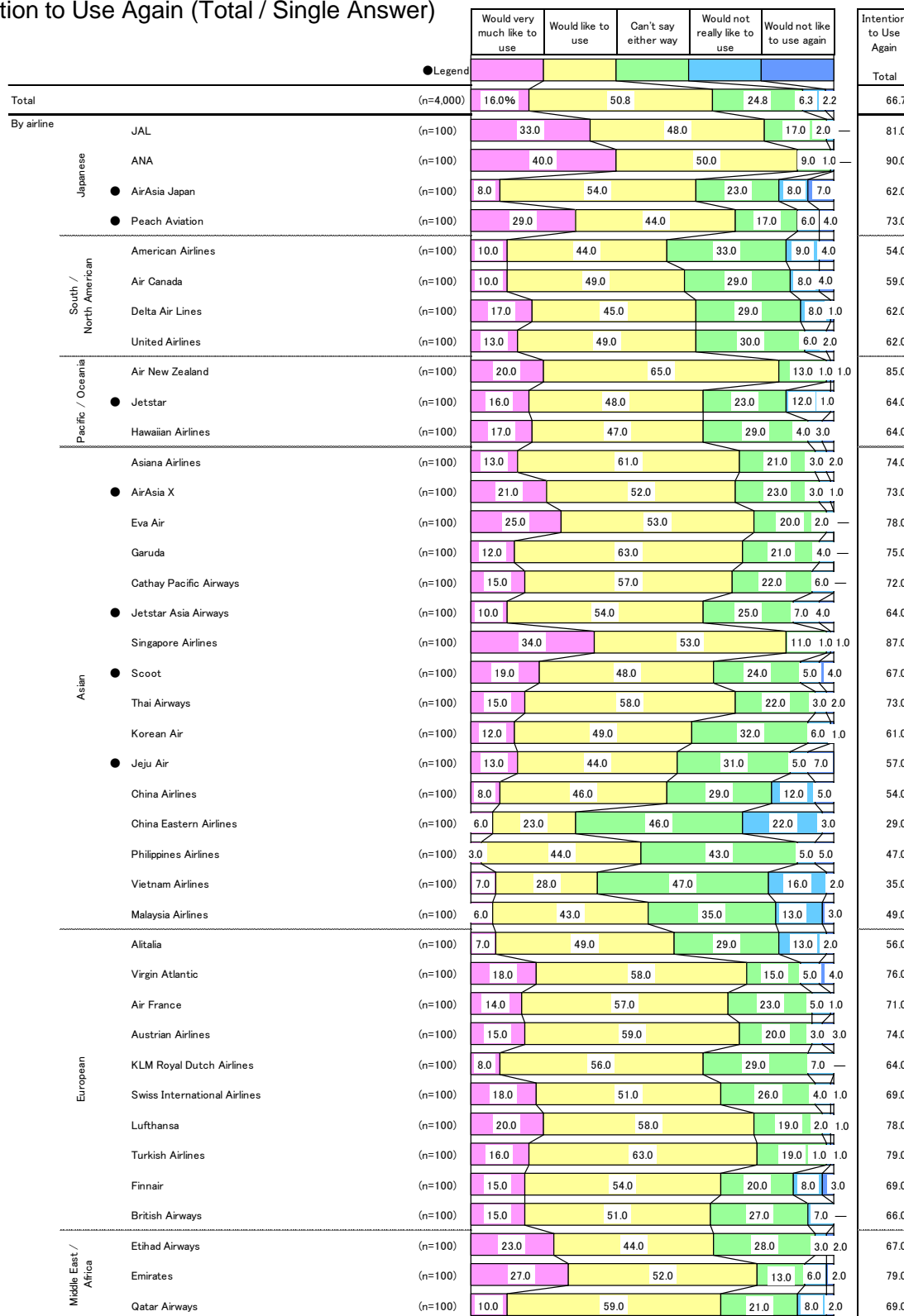
Sample	Number of TV channels and movies	Movies/TV programs available	Number of music channels	Music program content	Game types/content	In-flight magazine	Magazines, newspapers	On-demand broadcasts	Seatback TV	Extent of the free entertainment that is available	Prices, selection, etc. of in-flight sales	Other	Nothing in particular	
Reasons for satisfaction	1,797	42.4	53.1	16.6	13.1	10.1	10.5	8.3	4.6	6.6	9.2	2.6	0.5	16.4
Reasons for dissatisfaction	1,754	23.0	36.1	7.1	7.9	5.0	6.3	6.8	2.9	4.2	6.0	3.1	3.5	37.7

† "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" : 16% and "Would like to use") was 67%.
- A breakdown by airline shows that in terms of "Intention to Use Again – Total," ANA scored 90%. This was followed by Singapore Airlines (87%) and Air New Zealand (85%), which rounded out the top 3.
- Among the LCC, Peach Aviation and AirAsia X received a score of 73%, which placed them in 13th place 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, 58% of the respondents gave ANA, which left it in the top spot, as was the case last year. This was followed by JAL (45%) and Singapore Airlines (23%).
- Among the LCCs, Peach Aviation ended up in 7th place at 7%, while Jetstar Japan earned 8th place with 6%.

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

		2014 Survey		2013 Survey		Rate of increase
		n(=4,000)	(%)	Ranking (n=4,000)	n(=4,000)	(%)
1	ANA [Japanese]	n=2,333	58.3	1	54.0	↑
2	JAL [Japanese]	n=1,793	44.8	2	42.3	↑
3	Singapore Airlines [Asian]	n=903	22.6	3	25.1	↓
4	Emirates [Middle East / Africa]	n=623	15.6	4	17.8	↓
5	Lufthansa [European]	n=301	7.5	6	8.0	—
6	Air France [European]	n=286	7.2	7	6.7	—
7	● Peach Aviation [Japanese]	n=281	7.0	5	8.5	↓
8	◎ Jetstar Japan	n=244	6.1	10	5.0	↑
9	Delta Air Lines [South / North American]	n=215	5.4	15	3.8	↑
10	KLM Royal Dutch Airlines [European]	n=197	4.9	9	5.2	—
11	Virgin Atlantic [European]	n=185	4.6	8	5.7	↓
12	United Airlines [South / North American]	n=167	4.2	12	4.0	—
13	Thai Airways [Asian]	n=156	3.9	16	3.5	—
14	Cathay Pacific Airways [Asian]	n=150	3.8	14	3.8	—
15	● Vanilla Air	n=135	3.4	*	*	*
16	Finnair [European]	n=127	3.2	13	4.0	—
17	Qatar Airways [Middle East / Africa]	n=126	3.2	21	2.8	—
18	Hawaiian Airlines [Pacific / Oceania]	n=122	3.1	19	3.0	—
19	Air New Zealand [Pacific / Oceania]	n=117	2.9	28	1.8	↑
20	Asiana Airlines [Asian]	n=117	2.9	20	2.9	—
21	Air Canada [South / North American]	n=114	2.9	27	1.9	↑
22	Korean Air [Asian]	n=102	2.6	24	2.5	—
23	Qantas	n=89	2.2	18	3.0	—
24	◎ Star Flyer	n=88	2.2	*	*	*
25	Ethiad Airways [Middle East / Africa]	n=83	2.1	22	2.7	—
26	Turkish Airlines [European]	n=82	2.1	23	2.5	—
27	Swiss International Airlines [European]	n=78	2.0	25	2.3	—
28	British Airways [European]	n=74	1.9	17	3.0	↓
29	American Airlines [South / North American]	n=68	1.7	29	1.7	—
30	Austrian Airlines [European]	n=65	1.6	31	1.5	—
31	Alitalia [European]	n=62	1.6	30	1.6	—
32	● Jetstar [Pacific / Oceania]	n=56	1.4	33	1.1	—
33	● AirAsia X [Asian]	n=48	1.2	36	0.9	—
34	Eva Air [Asian]	n=47	1.2	35	1.0	—
35	Scandinavian Airlines	n=44	1.1	32	1.5	—
36	China Airlines [Asian]	n=41	1.0	34	1.0	—
37	Air Tahiti Nui	n=39	1.0	37	0.9	—
38	Garuda [Asian]	n=38	1.0	38	0.9	—
39	Malaysia Airlines [Asian]	n=36	0.9	26	2.0	↓
40	Vietnam Airlines [Asian]	n=21	0.5	40	0.5	—
41	● Jeju Air [Asian]	n=19	0.5	39	0.5	—
42	● Cebu Pacific Air	n=16	0.4	47	0.3	—
43	Aero Mexico	n=15	0.4	53	0.2	—
44	● Scoot [Asian]	n=14	0.4	45	0.3	—
45	Philippines Airlines [Asian]	n=14	0.4	44	0.3	—
46	● Jetstar Asia Airways [Asian]	n=13	0.3	40	0.5	—
47	China Eastern Airlines [Asian]	n=13	0.3	42	0.4	—
48	US Airways	n=12	0.3	49	0.2	—
49	Air Caledonia International	n=12	0.3	51	0.2	—
50	SriLankan Airlines	n=12	0.3	51	0.2	—
51	● Spring Airlines	n=11	0.3	58	0.1	—
52	● Hong Kong Express Airways	n=9	0.2	69	—	—
53	● Air Busan	n=8	0.2	53	0.2	—
54	● Eastar Jet	n=7	0.2	53	0.2	—
55	Aeroflot	n=7	0.2	47	0.3	—
56	Egyptair	n=6	0.2	45	0.3	—
57	Air India	n=5	0.1	64	0.1	—
58	Dragonair	n=4	0.1	61	0.1	—
59	Shanghai Airlines	n=3	0.1	61	0.1	—
60	Asia Atlantic Airlines	n=2	0.1	*	*	*
61	Air China	n=2	0.1	42	0.4	—
62	TransAsia Airways	n=2	0.1	*	*	*
63	Hong Kong Airlines	n=2	0.1	53	0.2	—
64	Air Macau	n=2	0.1	61	0.1	—
65	Iran Air	n=2	0.1	57	0.1	—
66	Aurora Aviation (formerly SAT Airlines)	n=2	0.1	61	0.1	—
67	Siberia Airlines (S7 Airlines)	n=2	0.1	69	—	—
68	Air Niugini	n=1	—	58	0.1	—
69	Hainan Airlines	n=1	—	74	—	—
70	China Southern Airlines	n=1	—	49	0.2	—
71	● TWay Airlines	n=1	—	64	0.1	—
72	Pakistan International Airlines	n=1	—	69	—	—
73	Miat Mongolian Airlines	n=1	—	58	0.1	—
74	Vladivostok Air	n=1	—	69	—	—
75	Xiamen Air	n=0	—	64	0.1	—
76	Uzbekistan Airways	n=0	—	74	—	—
77	Shandong Airlines	n=0	—	74	—	—
78	● Jin Air	n=0	—	69	—	—
79	Shenzhen Air	n=0	—	64	0.1	—
80	Other	n=25	0.6	—	—	—
81	Don't know	n=249	6.2	5.3	—	—

† 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 2014).

† 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 2013 survey and 2014 survey.

# Reference: From Results of the "2014 AB-ROAD Overseas Travel Survey"

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

### "2014 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's Net Monitor Panel of INTAGE Inc., these were Japanese citizens aged 18 years and over who traveled overseas in the year 2013 (the month of departure being in 2013).

#### Timing

Mon. 24 Mar through Thu. 27 Mar, 2014

#### Research Method

Internet survey

#### Numbers Tabulated

4,936 respondents (respondents contacted: 7,902; samples collected:5,200 (successful collection rate of :65.8%))

#### 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+
0.557	0.841	0.977	1.779	1.018	0.794	0.676	1.349

#### 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."

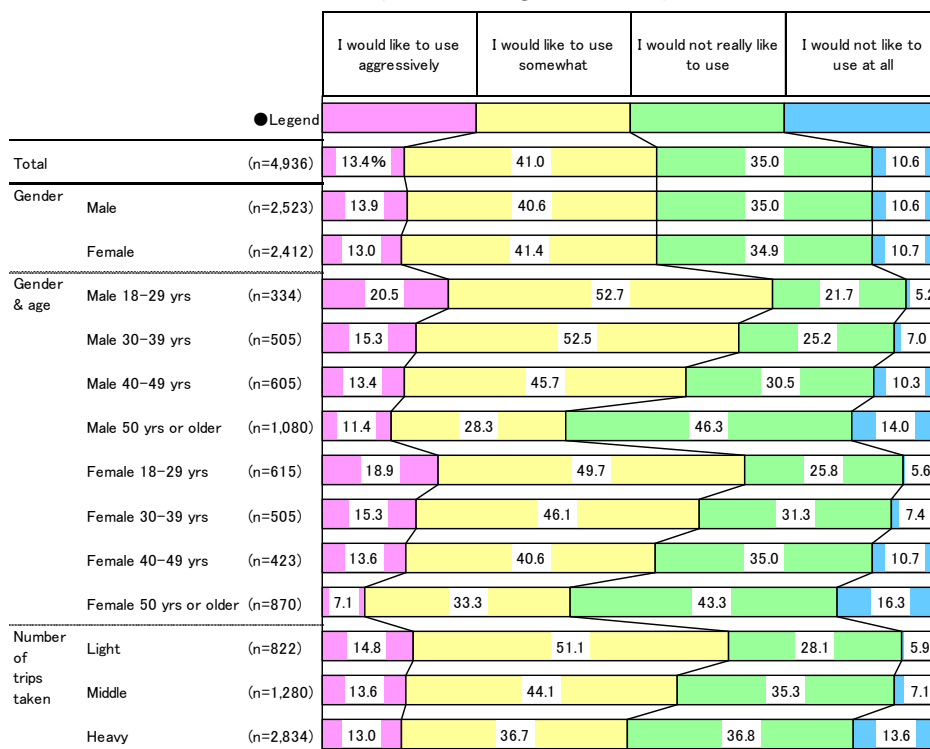
Light: Those who have traveled overseas one to three times before

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 54% (i.e., the sum of "I would like to use aggressively" (13%) and "I would like to use somewhat").
- A breakdown by gender and 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)



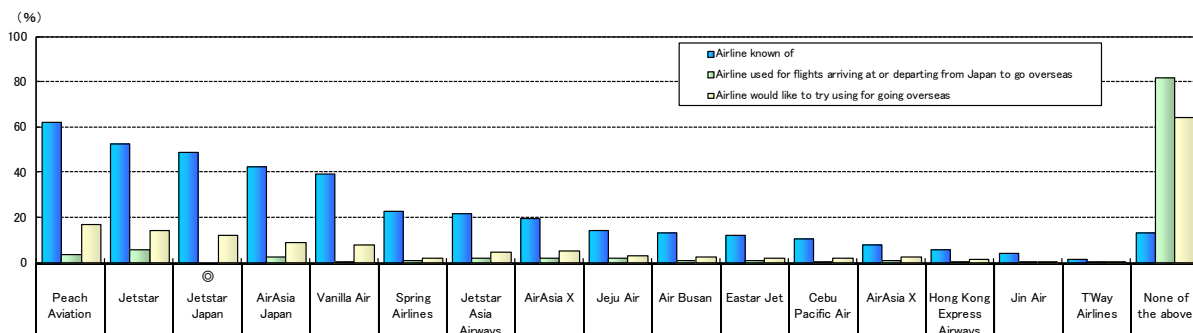
† Respondents were asked about their intention to use low-cost carriers when going overseas for travel/leisure purposes.

# Reference: From Results of the "2014 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 6%. 82% had never used before.
- As for LCC respondents wanted to try using in the future for overseas travel, "Peach Aviation (17%)" and "Jetstar (15%)" were the top two choices. These were followed by "Jetstar Japan (12%)" and "AirAsia Japan (9%)."

### ■ Low-cost Carrier Awareness / Prior Use / Intention to Use (Total / Multiple Answers for each)



Sample		Peach Aviation	Jetstar	Jetstar Japan	AirAsia Japan	Vanilla Air	Spring Airlines	Jetstar Asia Airways	AirAsia X	Jeju Air	Air Busan	Eastar Jet	Cebu Pacific Air	AirAsia X	Hong Kong Express Airways	Jin Air	TWay Airlines	None of the above
Airline known of (n=4,936)		62.2	52.4	48.7	42.3	39.6	22.9	21.6	19.7	14.1	13.4	12.1	10.9	7.8	6.0	4.2	1.7	13.5
Airline used for flights arriving at or departing from Japan to go overseas (n=4,936)		3.9	5.9	*	2.9	0.7	0.8	1.9	2.2	2.1	1.1	1.0	0.6	1.1	0.4	0.2	0.2	82.0
Airline would like to try using for going overseas (n=4,936)		17.2	14.6	12.2	9.3	8.0	1.9	5.0	5.5	3.0	2.4	2.1	2.2	2.6	1.5	0.5	0.5	64.1

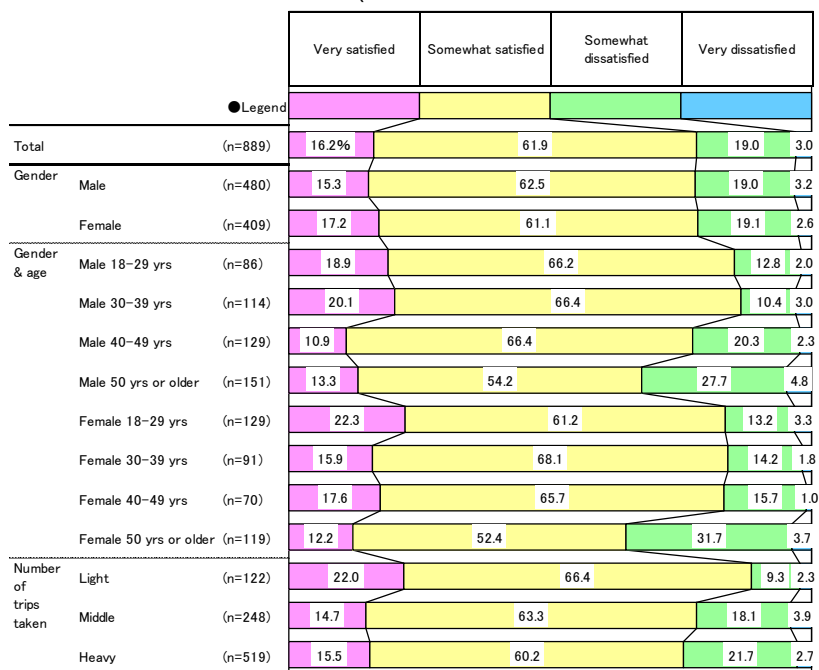
† "©" indicates airlines without international flights at the time of the study (Mar. 2014).

‡ Airlines marked with an asterisk are those not asked about as a "Airline 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 "2014 AB-ROAD Overseas Travel Survey" 2. Evaluations of Low-cost Carriers (LCC)

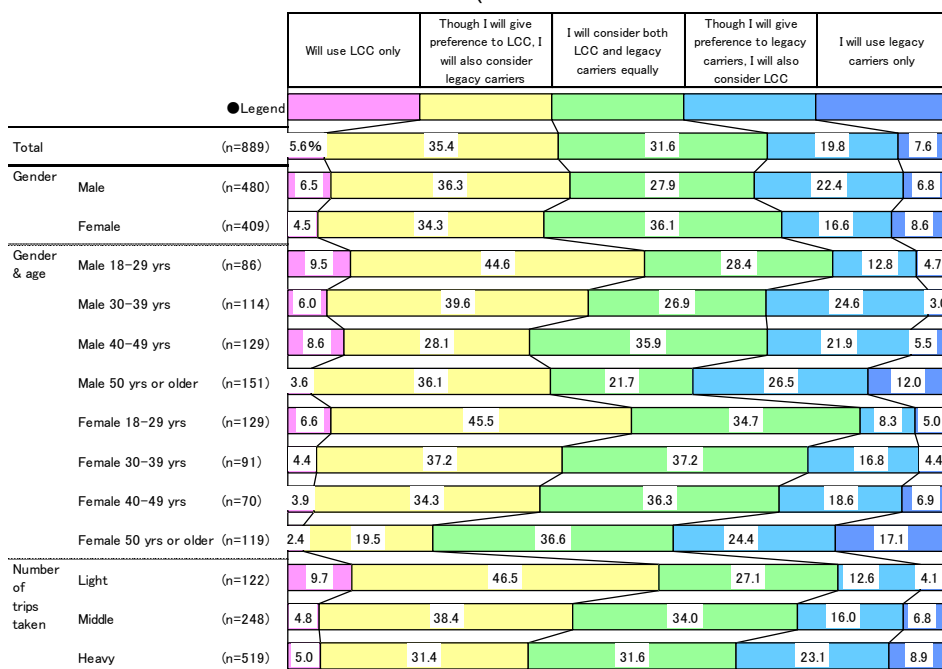
- As for satisfaction with low-cost carriers used, the sum of "Very satisfied" (16%) and "Somewhat satisfied" was 78%.
- A breakdown by gender and age shows that females 18-29 are a demographic with fewer number of trips overseas but a high percentage of "Very satisfied" responses.
- As for the intention 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 41%.
- 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 legacy carriers" 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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GranTokyoSOUTHTOWER,1-9-2 MarunouchiChiyoda-ku Tokyo, Japan  
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