

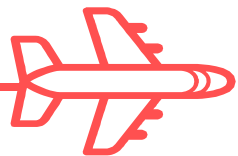
エイビロード  
**AB-ROAD**

**エアライン**

**満足度調査2015**

Market Survey Of Airline Satisfaction

～2014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 2014.

## ○Respondents

The survey was done on 6,502 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 2014 (the month of departure being in 2014).

\* Respondents included also those who traveled for work purposes and those on long-term stays.

## ○Timing

Thu. 16 April through Mon. 20 April, 2015

## ○Research Method

Internet survey

## ○Tabulation Numbers

4,000 respondents (respondents contacted: 6,502, samples collected: 4,620s (successful collection rate of 71.1%))

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

### ■Airlines included in the survey

ANA, JAL, Vanilla Air, Peach Aviation, American Airlines, Air Canada, Delta Air Lines, United Airlines, Jetstar, Air New Zealand, Hawaiian Airlines, Asiana Airlines, AirAsia X, Eva Air, Garuda, Cathay Pacific Airways, Singapore Airlines, Korean Air, Thai Airways, Jeju Air, China Airlines, Air China, China Eastern Airlines, Philippines Airlines, Vietnam Airlines, Hong Kong Express Airways, Malaysia Airlines, KLM Royal Dutch Airlines, Alitalia, Air France, Austrian Airlines, Swiss International Airlines, Scandinavian Airlines, Turkish Airlines, Finnair, British Airways, Lufthansa, 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 2014, according to the results of the "2015 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 given being rounded to the second decimal point.
- (2) Figures from a past survey are quoted in order to provide longitudinal data.  
"2014 Airline Satisfaction Survey" - Timing: 16 April through 21 April 2014; Sample size tabulated: 4,000s (100 samples for each airline)
- (3) In this survey, respondents who in 2014 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.

## "2015 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 2014 (the month of departure being in 2014).

### ○Timing

Mon. 23 Mar through Thu. 26 Mar, 2015

### ○Research Method

Internet survey

### ○Numbers Tabulated

5,000 respondents (respondents contacted: 7,992; samples collected: 5,225 (successful collection rate of: 65.4%))

### ○Method of Tabulation

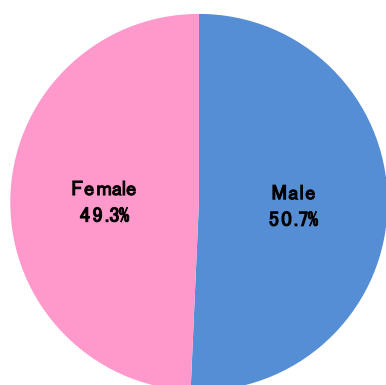
The survey results were weighted to correspond with the breakdown of leisure travelers (by gender and age).

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+
0.527	0.876	1.036	1.751	0.946	0.801	0.666	1.381

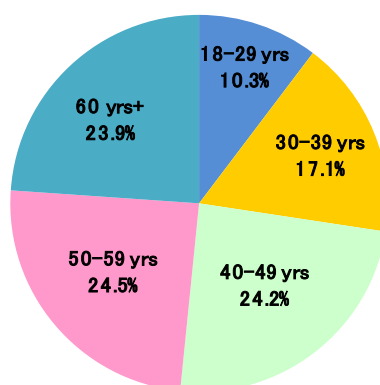
## 2. Profile of the Respondents

■ Gender (Total / Single Answer)



(n=4,000)

■ Age (Total / Single Answer)



(n=4,000)

■ 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	2.5	2.6	50.7	3.3	47.4	3.2	11.3	20.2	17.5	2.7	3.1	1.6	4.9

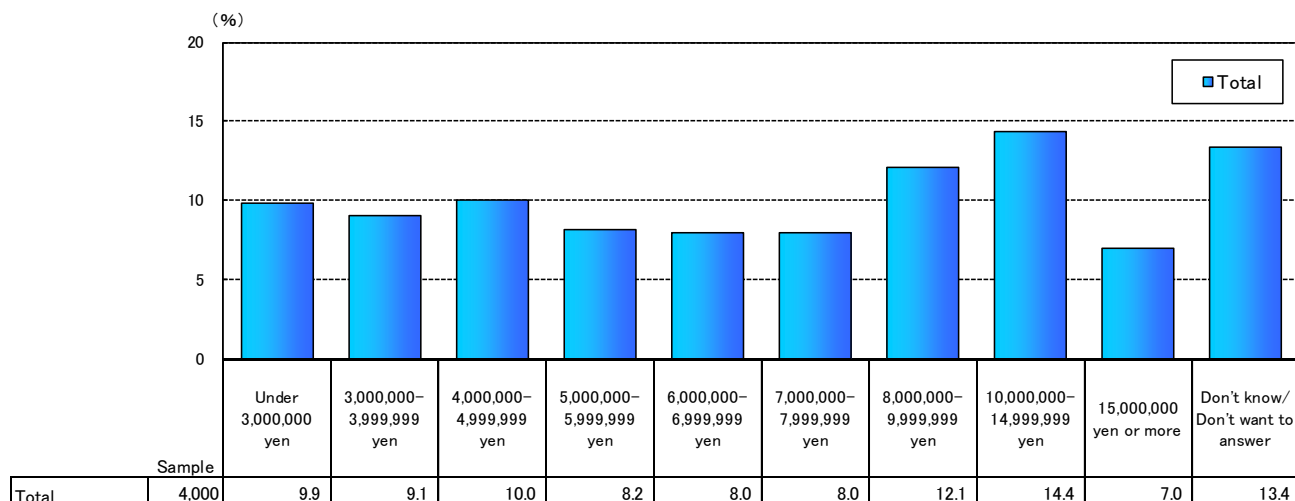
(%)

■ Occupation (Total / Single Answer)

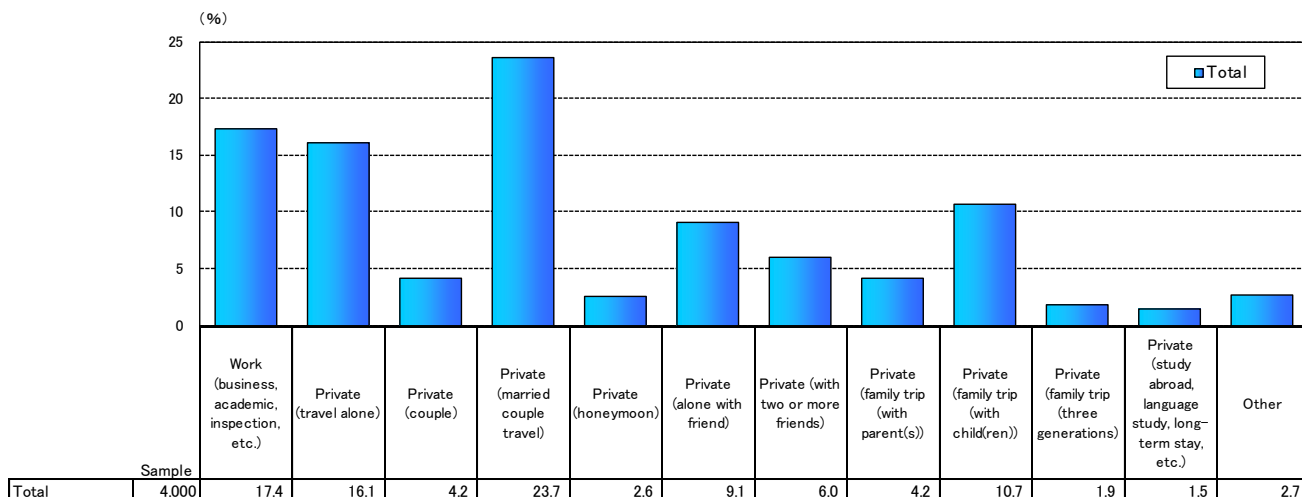
	Sample	Office workers					Civil servants/Educators	Self-employed	Freelance	Temporary worker/Contracted employee	Part-timers	Students	Full-time housewives	Unemployed	Other
		Office workers/General (clerical)	Office workers/General (research or technical)	Office workers/General (sales)	Office workers/General (others)	Office workers/Manager class, company directors									
Total	4,000	16.0	8.5	4.5	4.2	12.5	5.1	5.3	2.9	3.2	8.3	2.0	15.4	10.9	1.3

(%)

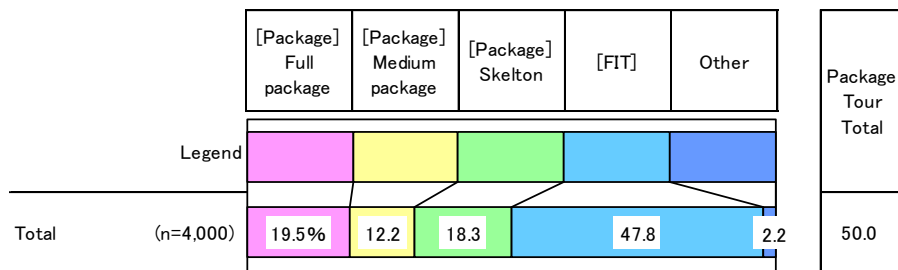
■ Annual Household Income (Total / Single Answer)



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

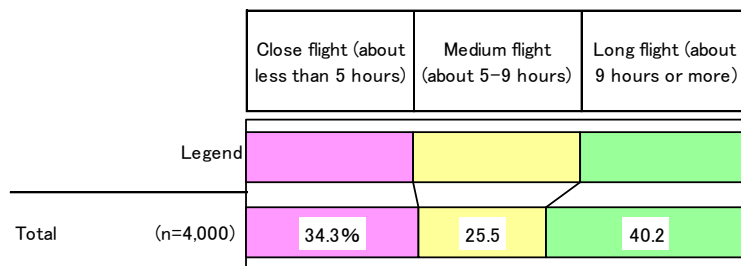


### ■ Overseas Travel Type (Total / Single Answer)

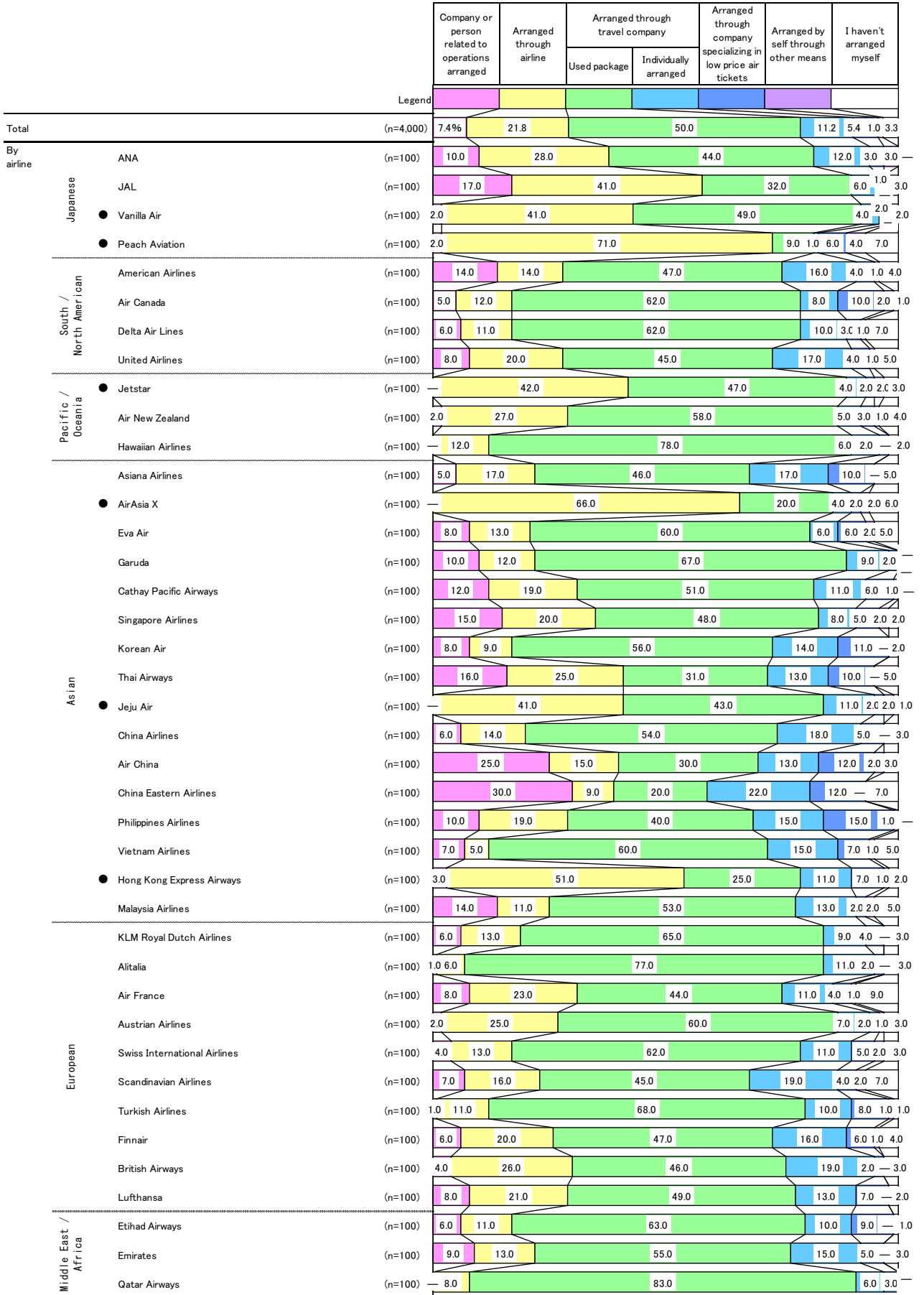


- † [Package] Full package : Tour that is scheduled with sightseeing, activities, and most meals
- [Package] Medium package : Tour that is scheduled with some sightseeing, activities, and meals, as well as tours with some free time
- [Package] Skelton : Tour that basically has free time at destinations,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

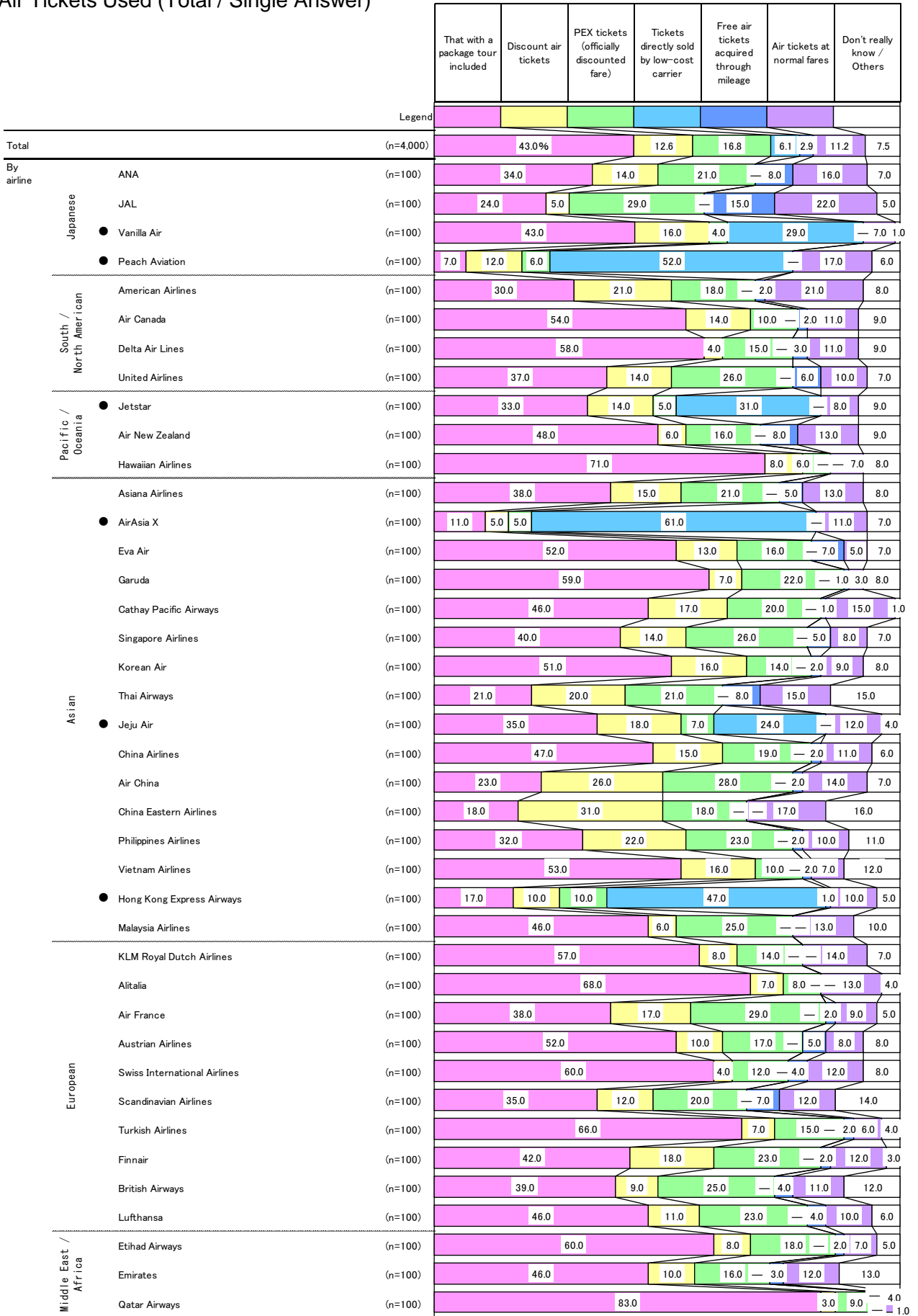


### Means of Arranging Air Tickets Used (Total / Single Answer)



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

■ Air Tickets Used (Total / Single Answer)



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



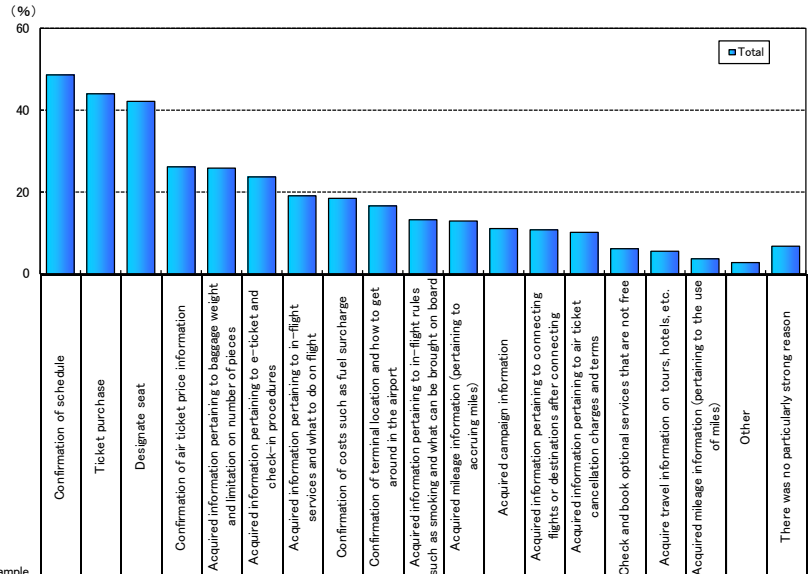
### Whether Airline Website Was Used When Making Overseas Travel (Total / Single Answer)

		Used	Didn't use	Period used		
Legend				Prior to booking	At time of booking	After booking
Total	(n=4,000)	57.5%	42.5	50.7	42.1	46.0
By airline						
● Peach Aviation [Japanese]	(n=100)	92.0	8.0	89.0	88.0	79.0
● AirAsia X [Asian]	(n=100)	90.0	10.0	90.0	87.0	78.0
● Hong Kong Express Airways [Asian]	(n=100)	83.0	17.0	82.0	76.0	65.0
● Vanilla Air [Japanese]	(n=100)	78.0	22.0	73.0	68.0	63.0
JAL [Japanese]	(n=100)	77.0	23.0	66.0	61.0	68.0
ANA [Japanese]	(n=100)	75.0	25.0	70.0	60.0	64.0
● Jeju Air [Asian]	(n=100)	72.0	28.0	69.0	62.0	52.0
● Jetstar [Pacific / Oceania]	(n=100)	70.0	30.0	64.0	60.0	62.0
British Airways [European]	(n=100)	65.0	35.0	54.0	42.0	51.0
Air France [European]	(n=100)	64.0	36.0	54.0	47.0	52.0
Air New Zealand [Pacific / Oceania]	(n=100)	63.0	37.0	53.0	43.0	49.0
United Airlines [South / North American]	(n=100)	62.0	38.0	52.0	49.0	49.0
Thai Airways [Asian]	(n=100)	60.0	40.0	57.0	50.0	51.0
Scandinavian Airlines [European]	(n=100)	60.0	40.0	48.0	38.0	49.0
Finnair [European]	(n=100)	59.0	41.0	53.0	37.0	45.0
Philippines Airlines [Asian]	(n=100)	58.0	42.0	54.0	40.0	41.0
Turkish Airlines [European]	(n=100)	58.0	42.0	44.0	34.0	41.0
Asiana Airlines [Asian]	(n=100)	57.0	43.0	53.0	41.0	42.0
Eva Air [Asian]	(n=100)	57.0	43.0	51.0	37.0	45.0
Singapore Airlines [Asian]	(n=100)	56.0	44.0	48.0	43.0	39.0
Air China [Asian]	(n=100)	55.0	45.0	49.0	50.0	44.0
Austrian Airlines [European]	(n=100)	54.0	46.0	46.0	36.0	46.0
Malaysia Airlines [Asian]	(n=100)	53.0	47.0	40.0	30.0	40.0
China Airlines [Asian]	(n=100)	52.0	48.0	42.0	36.0	42.0
Emirates [Middle East / Africa]	(n=100)	52.0	48.0	47.0	34.0	45.0
Delta Air Lines [South / North American]	(n=100)	52.0	48.0	43.0	35.0	48.0
American Airlines [South / North American]	(n=100)	51.0	49.0	47.0	39.0	46.0
Garuda [Asian]	(n=100)	50.0	50.0	46.0	26.0	35.0
Cathay Pacific Airways [Asian]	(n=100)	49.0	51.0	43.0	40.0	43.0
Etihad Airways [Middle East / Africa]	(n=100)	49.0	51.0	41.0	32.0	37.0
Swiss International Airlines [European]	(n=100)	48.0	52.0	38.0	23.0	35.0
Lufthansa [European]	(n=100)	48.0	52.0	39.0	30.0	41.0
Air Canada [South / North American]	(n=100)	48.0	52.0	42.0	33.0	40.0
Hawaiian Airlines [Pacific / Oceania]	(n=100)	46.0	54.0	36.0	25.0	35.0
KLM Royal Dutch Airlines [European]	(n=100)	44.0	56.0	38.0	31.0	37.0
Qatar Airways [Middle East / Africa]	(n=100)	44.0	56.0	35.0	28.0	36.0
Vietnam Airlines [Asian]	(n=100)	40.0	60.0	35.0	23.0	26.0
Alitalia [European]	(n=100)	39.0	61.0	34.0	19.0	27.0
Korean Air [Asian]	(n=100)	36.0	64.0	31.0	26.0	30.0
China Eastern Airlines [Asian]	(n=100)	35.0	65.0	32.0	23.0	23.0

† 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)

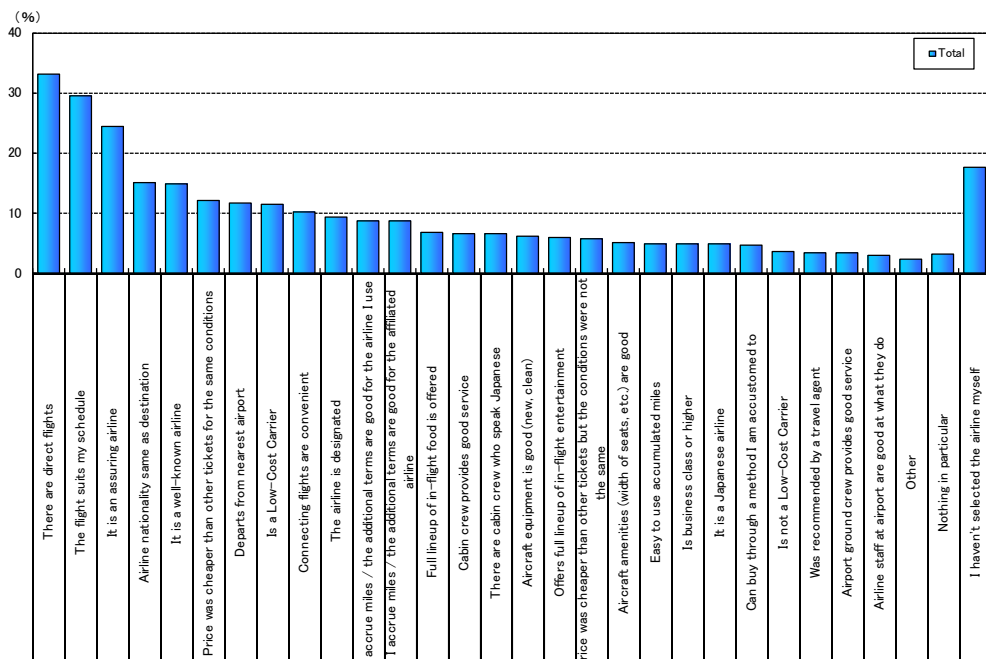
Reason for Using Airline Website (Airline website user / Multiple Answer)



Total		Sample (n=2,301)	49.0	44.2	42.3	26.4	26.0	23.8	19.1	18.6	16.6	13.4	12.9	11.1	10.8	10.3	6.3	5.7	3.7	2.9	6.9
By airline	ANA [Japanese]	(n=75)	64.0	58.7	66.7	33.3	18.7	33.3	18.7	22.7	9.3	14.7	20.0	16.0	5.3	9.3	5.3	14.7	13.3	—	1.3
	JAL [Japanese]	(n=77)	48.1	57.1	63.6	27.3	10.4	31.2	13.0	23.4	11.7	7.8	20.8	10.4	6.5	11.7	—	10.4	7.8	5.2	2.6
	● Vanilla Air [Japanese]	(n=78)	51.3	61.5	41.0	29.5	29.5	25.6	9.0	17.9	19.2	14.1	—	16.7	3.8	17.9	15.4	—	—	1.3	9.0
	● Peach Aviation [Japanese]	(n=92)	57.6	85.9	31.5	43.5	32.6	23.9	6.5	25.0	14.1	19.6	—	18.5	4.3	18.5	18.5	1.1	—	1.1	4.3
	American Airlines [South / North American]	(n=51)	54.9	39.2	54.9	21.6	23.5	27.5	11.8	11.8	19.6	17.6	17.6	5.9	17.6	11.8	5.9	5.9	7.8	2.0	3.9
	Air Canada [South / North American]	(n=48)	45.8	35.4	43.8	20.8	29.2	16.7	14.6	12.5	6.3	14.6	12.5	6.3	8.3	4.2	6.3	6.3	4.2	4.2	6.3
	Delta Air Lines [South / North American]	(n=52)	50.0	32.7	65.4	21.2	23.1	28.8	11.5	15.4	15.4	9.6	19.2	3.8	11.5	9.6	1.9	7.7	11.5	—	5.8
	United Airlines [South / North American]	(n=62)	53.2	40.3	61.3	19.4	24.2	27.4	19.4	16.1	16.1	11.3	16.1	9.7	12.9	11.3	4.8	8.1	9.7	4.8	8.1
	● Jetstar [Pacific / Oceania]	(n=70)	57.1	70.0	52.9	34.3	38.6	27.1	14.3	27.1	12.9	24.3	1.4	20.0	11.4	8.6	17.1	4.3	1.4	2.9	5.7
	Air New Zealand [Pacific / Oceania]	(n=63)	47.6	44.4	44.4	30.2	41.3	22.2	27.0	17.5	25.4	15.9	12.7	14.3	17.5	11.1	4.8	9.5	1.6	—	6.3
	Hawaiian Airlines [Pacific / Oceania]	(n=46)	50.0	32.6	30.4	28.3	37.0	21.7	39.1	15.2	23.9	23.9	30.4	15.2	6.5	6.5	8.7	6.5	4.3	4.3	4.3
	Asiana Airlines [Asian]	(n=57)	42.1	35.1	28.1	24.6	15.8	17.5	8.8	14.0	8.8	7.0	5.3	5.3	—	10.5	—	5.3	3.5	3.5	17.5
	● AirAsia X [Asian]	(n=90)	65.6	77.8	44.4	51.1	35.6	38.9	11.1	26.7	16.7	18.9	6.7	22.2	8.9	14.4	30.0	6.7	3.3	1.1	4.4
	Eva Air [Asian]	(n=57)	47.4	29.8	47.4	8.8	15.8	19.3	22.8	8.8	15.8	8.8	8.8	8.8	—	3.5	—	3.5	5.3	3.5	12.3
	Garuda [Asian]	(n=50)	40.0	38.0	24.0	24.0	28.0	10.0	28.0	24.0	8.0	20.0	14.0	8.0	10.0	8.0	4.0	14.0	4.0	6.0	6.0
	Cathay Pacific Airways [Asian]	(n=49)	44.9	38.8	44.9	18.4	24.5	20.4	20.4	18.4	14.3	20.4	10.2	14.3	—	8.2	—	8.2	4.1	2.0	10.2
	Singapore Airlines [Asian]	(n=56)	50.0	39.3	53.6	17.9	19.6	25.0	21.4	19.6	21.4	7.1	10.7	12.5	8.9	12.5	3.6	12.5	3.6	—	5.4
	Korean Air [Asian]	(n=36)	36.1	38.9	44.4	19.4	16.7	27.8	8.3	11.1	13.9	5.6	13.9	—	—	5.6	—	2.8	—	5.6	8.3
	Thai Airways [Asian]	(n=60)	50.0	46.7	55.0	21.7	16.7	20.0	8.3	25.0	6.7	3.3	3.3	3.3	10.0	5.0	1.7	3.3	3.3	6.7	1.7
	● Jeju Air [Asian]	(n=72)	47.2	65.3	22.2	43.1	23.6	22.2	11.1	23.6	12.5	4.2	2.8	13.9	4.2	11.1	6.9	8.3	1.4	—	6.9
	China Airlines [Asian]	(n=52)	40.4	36.5	32.7	26.9	15.4	23.1	17.3	15.4	9.6	3.8	17.3	9.6	5.8	7.7	1.9	7.7	1.9	1.9	17.3
	Air China [Asian]	(n=55)	45.5	40.0	40.0	29.1	12.7	30.9	9.1	18.2	7.3	5.5	9.1	9.1	3.6	14.5	3.6	5.5	—	5.5	7.3
	China Eastern Airlines [Asian]	(n=35)	34.3	40.0	22.9	11.4	20.0	14.3	5.7	8.6	17.1	8.6	5.7	—	20.0	2.9	—	2.9	8.6	—	11.4
	Philippines Airlines [Asian]	(n=58)	39.7	37.9	27.6	39.7	17.2	10.3	10.3	31.0	8.6	5.2	5.2	10.3	10.3	6.9	5.2	3.4	1.7	—	6.9
	Vietnam Airlines [Asian]	(n=40)	25.0	22.5	17.5	12.5	25.0	17.5	20.0	2.5	20.0	12.5	12.5	7.5	5.0	7.5	—	2.5	2.5	5.0	17.5
	● Hong Kong Express Airways [Asian]	(n=83)	49.4	75.9	32.5	34.9	26.5	20.5	7.2	18.1	10.8	10.8	—	18.1	3.6	13.3	13.3	—	—	2.4	4.8
	Malaysia Airlines [Asian]	(n=53)	39.6	34.0	41.5	17.0	13.2	18.9	28.3	9.4	20.8	7.5	9.4	3.8	15.1	3.8	1.9	—	1.9	5.7	7.5
	KLM Royal Dutch Airlines [European]	(n=44)	43.2	43.2	47.7	27.3	25.0	22.7	18.2	15.9	11.4	13.6	15.9	4.5	15.9	18.2	6.8	6.8	—	2.3	6.8
	Alitalia [European]	(n=39)	38.5	20.5	35.9	20.5	30.8	17.9	20.5	20.5	12.8	20.5	25.6	20.5	5.1	5.1	2.6	5.1	2.6	5.1	7.7
	Air France [European]	(n=64)	62.5	35.9	45.3	18.8	28.1	25.0	20.3	14.1	14.1	25.0	10.9	9.4	7.8	3.1	6.3	—	4.7	4.7	4.7
	Austrian Airlines [European]	(n=54)	50.0	46.3	35.2	29.6	31.5	27.8	27.8	18.5	14.8	16.7	14.8	20.4	11.1	18.5	7.4	9.3	1.9	3.7	13.0
	Swiss International Airlines [European]	(n=48)	37.5	18.8	31.3	16.7	35.4	12.5	31.3	16.7	14.6	12.5	25.0	12.5	20.8	6.3	2.1	4.2	4.2	6.3	6.3
	Scandinavian Airlines [European]	(n=60)	58.3	40.0	46.7	25.0	33.3	25.0	28.3	21.7	36.7	11.7	18.3	6.7	30.0	15.0	10.0	6.7	8.3	3.3	6.7
	Turkish Airlines [European]	(n=58)	37.9	19.0	34.5	15.5	27.6	22.4	34.5	17.2	24.1	13.8	25.9	3.4	15.5	8.6	1.7	3.4	3.4	—	6.9
	Finnair [European]	(n=59)	52.5	32.2	42.4	33.9	35.6	37.3	32.2	25.4	30.5	20.3	8.5	10.2	20.3	13.6	5.1	—	3.4	5.1	5.1
	British Airways [European]	(n=65)	56.9	33.8	50.8	26.2	30.8	27.7	29.2	18.5	20.0	20.0	12.3	6.2	15.4	12.3	4.6	6.2	4.6	3.1	3.1
	Lufthansa [European]	(n=48)	50.0	27.1	58.3	20.8	25.0	29.2	18.8	18.8	31.3	18.8	16.7	10.4	16.7	10.4	2.1	4.2	6.3	2.1	6.3
	Ethiad Airways [Middle East / Africa]	(n=49)	42.9	22.4	28.6	24.5	28.6	16.3	36.7	14.3	20.4	12.2	34.7	12.2	26.5	8.2	6.1	2.0	6.1	4.1	6.1
	Emirates [Middle East / Africa]	(n=52)	55.8	26.9	42.3	11.5	28.8	19.2	26.9	9.6	30.8	19.2	17.3	3.8	30.8	9.6	1.9	9.6	1.9	5.8	7.7
	Qatar Airways [Middle East / Africa]	(n=44)	45.5	20.5	31.8	15.9	36.4	20.5	47.7	13.6	25.0	15.9	25.0	11.4	20.5	2.3	—	2.3	—	2.3	6.8

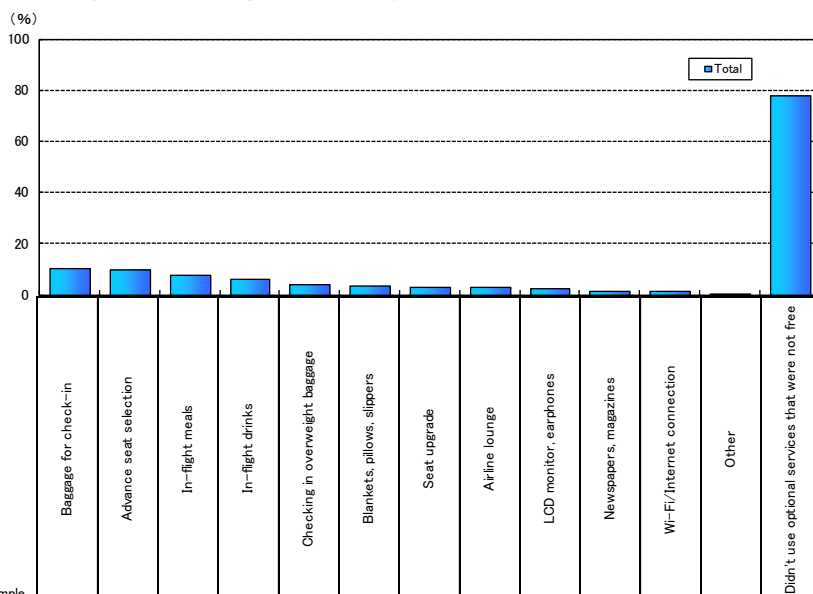
† ● indicates a low-cost carrier (LCC)

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



Sample		(n=4,000)																															
Total		33.2	29.6	24.5	15.1	14.9	12.2	11.7	11.5	10.3	9.4	8.8	8.8	6.8	6.7	6.5	6.1	6.0	5.8	5.1	4.9	4.9	4.8	4.7	3.6	3.5	3.4	3.0	2.3	3.2	17.6		
Gender	Male	(n=2,029)	34.2	29.3	26.7	15.7	16.9	12.1	12.5	11.8	10.3	8.7	9.0	9.4	7.3	8.0	7.8	7.3	5.7	6.1	5.8	5.8	5.8	6.4	4.6	4.4	3.5	4.3	3.6	2.3	3.4	14.7	
	Female	(n=1,971)	32.1	29.9	22.2	14.5	12.9	12.4	10.9	11.2	10.4	10.0	8.6	8.2	6.3	5.3	5.2	4.7	6.4	5.6	4.3	4.0	3.9	3.1	4.7	2.8	3.5	2.5	2.4	2.4	3.0	20.4	
Age	18-29 yrs	(n=410)	31.2	26.6	21.0	8.8	12.9	11.7	11.0	14.4	7.8	5.6	5.4	5.1	3.4	3.7	5.1	2.9	3.4	5.9	2.7	2.7	1.7	4.1	1.7	2.7	5.4	0.7	2.0	1.7	5.4	21.2	
	30-39 yrs	(n=684)	29.7	33.5	27.6	11.4	17.4	13.7	11.3	16.2	10.4	6.1	9.9	7.7	6.6	5.7	4.8	6.0	7.3	6.4	4.2	5.4	2.5	6.3	4.7	2.8	2.3	3.2	2.9	2.2	3.9	13.6	
	40-49 yrs	(n=968)	34.6	33.7	25.1	15.0	15.5	15.7	12.2	13.7	11.1	6.5	10.3	9.9	6.7	6.3	5.0	5.4	6.7	6.5	4.2	5.4	5.2	4.1	4.6	4.4	3.0	3.8	2.6	2.3	3.1	12.0	
	50-59 yrs	(n=981)	35.9	31.1	24.0	15.7	14.9	12.6	13.4	9.5	11.5	8.6	9.5	10.9	8.9	7.4	8.6	8.0	6.0	6.4	6.5	5.4	6.3	5.1	4.5	4.1	4.0	3.7	3.4	2.9	2.7	15.9	
	60 yrs or older	(n=957)	32.2	22.5	23.6	19.9	13.5	7.4	10.1	6.7	9.4	17.0	7.2	7.9	6.5	8.4	7.7	6.2	5.5	4.1	6.0	4.5	6.2	4.4	6.1	3.2	3.6	4.1	3.7	2.2	2.5	26.1	
Area of residence	Kanto	(n=2,027)	35.4	30.3	26.3	15.1	16.2	12.8	10.1	10.1	10.8	9.3	10.1	10.2	8.0	7.4	6.4	7.0	7.2	6.1	6.1	5.4	6.0	4.9	4.7	4.1	3.2	3.7	3.2	2.3	3.0	16.4	
	Kansai	(n=807)	32.0	31.5	22.3	15.7	15.1	12.1	13.9	14.5	8.2	9.7	6.6	7.6	5.0	5.8	6.9	4.3	5.3	6.2	3.2	4.0	3.2	4.3	4.3	3.6	3.0	2.5	3.0	2.5	2.7	19.3	
	Tokai	(n=452)	30.5	27.7	21.7	11.7	11.3	12.8	14.8	12.8	12.6	9.3	7.7	6.2	6.4	6.4	6.4	5.5	5.1	4.0	4.9	4.2	4.4	4.4	4.4	3.5	5.3	2.9	2.0	2.4	4.6	19.9	
Travel type	Package	(n=2,001)	27.0	19.6	22.2	13.7	13.9	5.4	8.7	6.6	5.5	16.1	5.3	5.6	6.4	5.8	6.8	4.7	5.2	2.3	4.0	2.8	4.2	4.2	1.6	3.1	5.8	3.2	2.9	1.8	2.8	30.6	
	Full package	(n=780)	18.8	9.7	19.9	11.5	12.8	2.2	5.0	3.1	4.5	20.6	4.6	6.5	5.6	5.3	5.3	3.8	4.0	0.9	3.3	1.9	3.5	2.9	0.9	3.3	5.3	2.6	2.3	1.5	2.2	41.8	
	Medium package	(n=489)	24.5	21.7	22.7	13.7	14.7	3.3	9.0	6.7	7.2	14.9	6.3	5.5	8.4	6.1	8.2	5.7	7.4	2.9	4.5	3.7	6.1	4.1	1.0	2.2	5.9	4.5	4.3	1.0	2.2	33.5	
	Skelton	(n=732)	37.4	28.8	24.3	16.1	14.5	10.2	12.6	10.2	5.6	12.2	5.3	4.8	6.0	6.1	7.7	4.9	5.1	3.4	4.5	3.3	3.7	5.6	2.9	3.6	6.3	3.1	2.6	2.6	4.0	16.8	
	FIT	(n=1,912)	39.2	40.0	26.9	16.4	16.1	19.2	14.5	16.8	15.1	2.4	12.4	12.1	7.1	7.7	6.0	7.5	7.0	9.4	6.0	7.0	5.8	5.6	7.6	4.1	1.2	3.7	3.1	2.8	3.6	4.2	
Accompanying traveler	Travel alone	(n=643)	33.7	31.9	25.7	14.6	14.8	20.1	14.5	18.8	11.8	6.2	12.1	11.2	10.0	8.1	6.2	5.8	8.7	9.3	6.5	7.2	5.1	4.7	8.6	5.8	2.5	3.9	4.2	3.0	2.5	10.7	
	With spouse/partner/on honeymoon	(n=1,223)	31.8	25.3	25.2	15.1	15.8	9.6	11.3	10.1	8.7	13.3	8.1	8.1	6.6	6.5	6.3	5.5	5.6	4.7	5.2	4.3	6.1	4.2	4.7	3.6	3.4	3.2	2.6	2.0	2.5	22.0	
	With friend	(n=602)	32.1	29.7	19.4	12.3	11.8	12.6	8.1	15.0	7.1	8.6	3.8	4.7	4.7	5.0	6.8	5.6	4.3	6.0	3.7	2.3	1.5	4.8	2.2	1.5	4.8	2.8	2.8	2.3	3.5	21.9	
	Family travel	(n=673)	33.4	27.8	22.3	16.2	13.1	11.0	11.0	10.8	11.0	11.4	9.1	6.7	7.3	6.4	4.9	5.6	6.4	5.8	4.3	5.5	4.0	4.3	3.9	3.0	3.9	3.7	2.2	1.9	2.8	17.4	
Travel class	Is business class or higher	(n=487)	38.4	31.6	34.5	23.6	22.4	8.6	10.9	4.1	16.0	8.4	15.4	16.4	15.4	12.7	9.9	12.9	6.4	3.5	15.4	11.9	38.4	6.4	7.0	7.0	3.7	8.0	7.0	3.5	2.3	7.4	
	Economy class	(n=3,513)	32.4	29.3	23.1	13.9	13.9	12.7	11.8	12.5	9.5	9.5	7.9	7.8	5.6	5.9	6.0	5.1	6.0	6.1	3.6	3.9	0.2	4.6	4.3	3.1	3.5	2.8	2.5	2.2	3.4	19.0	

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



		Sample													
		(n=4,000)	10.3	9.8	8.1	6.2	4.0	3.5	3.0	2.9	2.8	1.8	1.7	0.3	78.2
By airline	ANA [Japanese]	(n=100)	15.0	15.0	12.0	8.0	7.0	5.0	5.0	7.0	8.0	3.0	3.0	—	76.0
	JAL [Japanese]	(n=100)	6.0	9.0	7.0	8.0	2.0	5.0	5.0	5.0	6.0	4.0	6.0	—	82.0
	● Vanilla Air [Japanese]	(n=100)	21.0	23.0	26.0	21.0	3.0	3.0	8.0	—	3.0	—	2.0	1.0	45.0
	● Peach Aviation [Japanese]	(n=100)	28.0	26.0	14.0	10.0	9.0	2.0	6.0	—	2.0	3.0	3.0	1.0	40.0
	American Airlines [South / North American]	(n=100)	9.0	10.0	12.0	11.0	11.0	3.0	4.0	6.0	5.0	3.0	4.0	—	74.0
	Air Canada [South / North American]	(n=100)	5.0	5.0	3.0	4.0	2.0	1.0	1.0	2.0	1.0	—	1.0	—	86.0
	Delta Air Lines [South / North American]	(n=100)	8.0	12.0	7.0	9.0	4.0	4.0	7.0	2.0	3.0	1.0	2.0	—	79.0
	United Airlines [South / North American]	(n=100)	8.0	10.0	6.0	8.0	4.0	3.0	6.0	5.0	1.0	2.0	1.0	—	72.0
	● Jetstar [Pacific / Oceania]	(n=100)	37.0	29.0	21.0	12.0	15.0	5.0	5.0	2.0	6.0	1.0	1.0	—	35.0
	Air New Zealand [Pacific / Oceania]	(n=100)	10.0	8.0	7.0	2.0	8.0	5.0	6.0	6.0	2.0	2.0	1.0	—	79.0
	Hawaiian Airlines [Pacific / Oceania]	(n=100)	9.0	2.0	6.0	7.0	3.0	3.0	3.0	1.0	2.0	1.0	1.0	—	80.0
	Asiana Airlines [Asian]	(n=100)	11.0	8.0	5.0	5.0	2.0	3.0	1.0	3.0	3.0	—	1.0	—	84.0
	● AirAsia X [Asian]	(n=100)	38.0	39.0	42.0	17.0	14.0	6.0	5.0	1.0	2.0	—	1.0	—	26.0
	Eva Air [Asian]	(n=100)	12.0	7.0	7.0	8.0	1.0	6.0	—	1.0	3.0	3.0	1.0	1.0	84.0
	Garuda [Asian]	(n=100)	5.0	3.0	7.0	4.0	4.0	5.0	1.0	3.0	2.0	—	2.0	—	88.0
	Cathay Pacific Airways [Asian]	(n=100)	4.0	6.0	4.0	6.0	2.0	4.0	1.0	3.0	2.0	1.0	1.0	—	88.0
	Singapore Airlines [Asian]	(n=100)	10.0	7.0	8.0	6.0	1.0	6.0	3.0	5.0	4.0	4.0	1.0	1.0	86.0
	Korean Air [Asian]	(n=100)	5.0	2.0	4.0	2.0	2.0	—	—	2.0	3.0	3.0	1.0	—	90.0
	Thai Airways [Asian]	(n=100)	6.0	5.0	5.0	2.0	6.0	4.0	1.0	4.0	—	1.0	1.0	—	85.0
	● Jeju Air [Asian]	(n=100)	10.0	12.0	5.0	6.0	1.0	1.0	3.0	2.0	2.0	—	3.0	2.0	76.0
	China Airlines [Asian]	(n=100)	4.0	3.0	3.0	3.0	3.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	90.0
	Air China [Asian]	(n=100)	7.0	4.0	5.0	2.0	4.0	2.0	4.0	4.0	2.0	—	2.0	—	87.0
	China Eastern Airlines [Asian]	(n=100)	5.0	3.0	3.0	1.0	2.0	1.0	—	—	—	2.0	1.0	1.0	88.0
	Philippines Airlines [Asian]	(n=100)	8.0	10.0	4.0	3.0	9.0	1.0	2.0	2.0	1.0	1.0	—	—	81.0
	Vietnam Airlines [Asian]	(n=100)	6.0	3.0	4.0	3.0	1.0	3.0	1.0	4.0	4.0	1.0	1.0	—	90.0
	● Hong Kong Express Airways [Asian]	(n=100)	27.0	18.0	10.0	9.0	5.0	3.0	4.0	2.0	4.0	2.0	2.0	—	55.0
	Malaysia Airlines [Asian]	(n=100)	10.0	10.0	8.0	5.0	3.0	3.0	1.0	1.0	1.0	1.0	—	—	86.0
	KLM Royal Dutch Airlines [European]	(n=100)	5.0	7.0	6.0	6.0	—	4.0	4.0	1.0	1.0	2.0	1.0	1.0	84.0
	Alitalia [European]	(n=100)	5.0	7.0	4.0	5.0	1.0	5.0	3.0	3.0	4.0	3.0	2.0	—	84.0
	Air France [European]	(n=100)	5.0	7.0	6.0	3.0	5.0	5.0	5.0	4.0	3.0	4.0	1.0	—	83.0
	Austrian Airlines [European]	(n=100)	14.0	14.0	11.0	9.0	6.0	9.0	6.0	6.0	5.0	6.0	5.0	1.0	78.0
	Swiss International Airlines [European]	(n=100)	5.0	6.0	5.0	6.0	—	2.0	1.0	2.0	2.0	1.0	—	—	86.0
	Scandinavian Airlines [European]	(n=100)	17.0	19.0	17.0	13.0	7.0	11.0	7.0	11.0	8.0	5.0	6.0	1.0	65.0
	Turkish Airlines [European]	(n=100)	5.0	7.0	4.0	1.0	2.0	4.0	1.0	5.0	3.0	2.0	1.0	—	89.0
Finnair [European]	(n=100)	4.0	5.0	4.0	2.0	3.0	2.0	2.0	2.0	—	1.0	—	—	88.0	
British Airways [European]	(n=100)	12.0	11.0	6.0	6.0	2.0	1.0	2.0	3.0	2.0	1.0	4.0	1.0	76.0	
Lufthansa [European]	(n=100)	4.0	8.0	—	—	3.0	—	4.0	—	—	—	—	—	87.0	
Etihad Airways [Middle East / Africa]	(n=100)	4.0	4.0	5.0	4.0	—	3.0	—	2.0	4.0	3.0	—	—	93.0	
Emirates [Middle East / Africa]	(n=100)	4.0	5.0	6.0	5.0	1.0	2.0	1.0	1.0	2.0	1.0	4.0	—	87.0	
Qatar Airways [Middle East / Africa]	(n=100)	4.0	2.0	4.0	4.0	—	4.0	—	—	3.0	2.0	—	—	95.0	

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

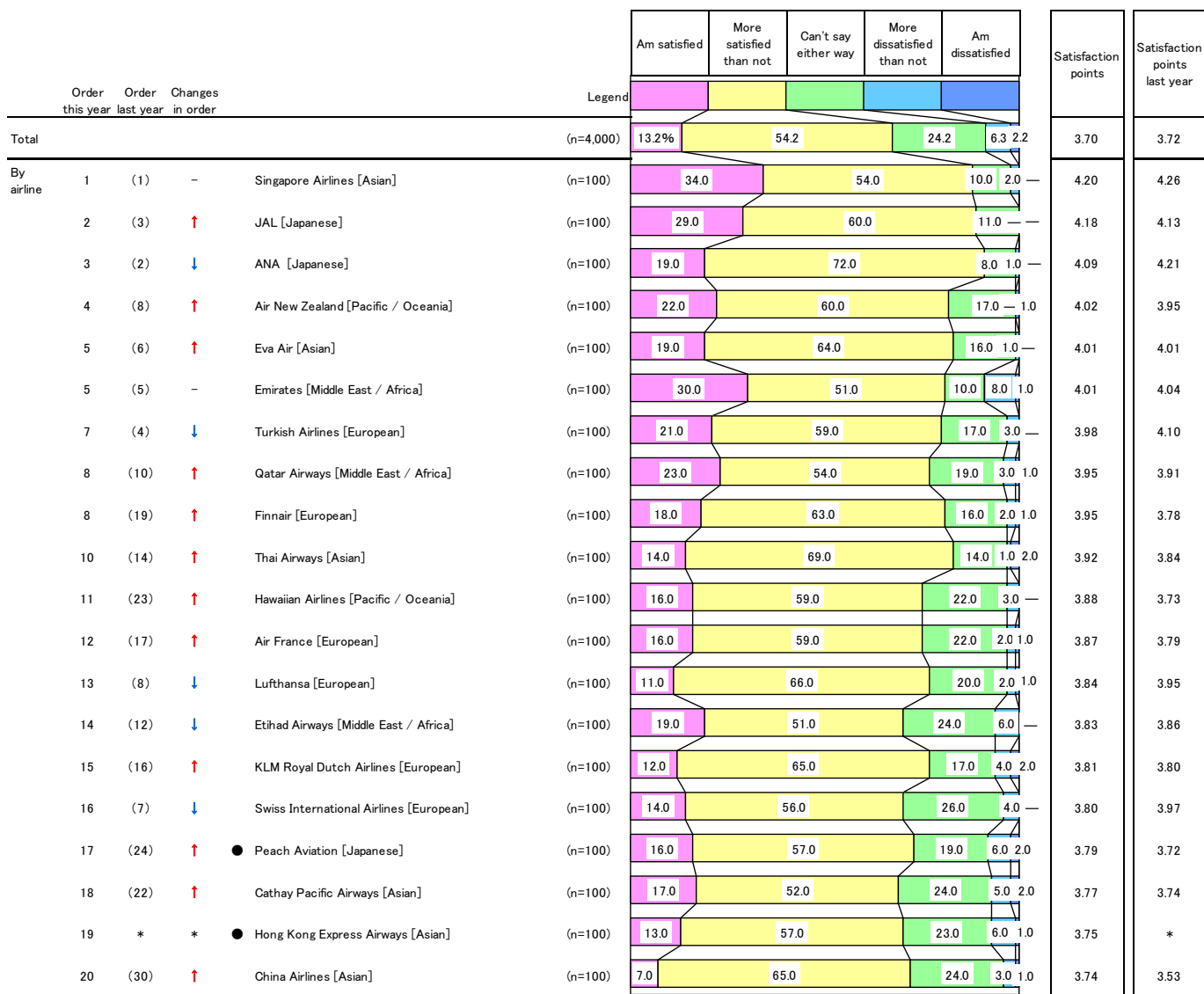
## **Part 2: Airline Evaluations**



# 1. Overall Satisfaction: Top 20

- The overall satisfaction total average was 3.70 points.
- At 4.20 points Singapore Airlines remained in the top spot from last year. Second was Japan Airlines (4.18 points) and was followed by ANA (4.09 points), which meant that two Japanese airlines entered the top three.
- Two of the top 20 were LCC. The highest ranked was Peach Aviation at 17<sup>th</sup>.

## ■ 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.

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

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

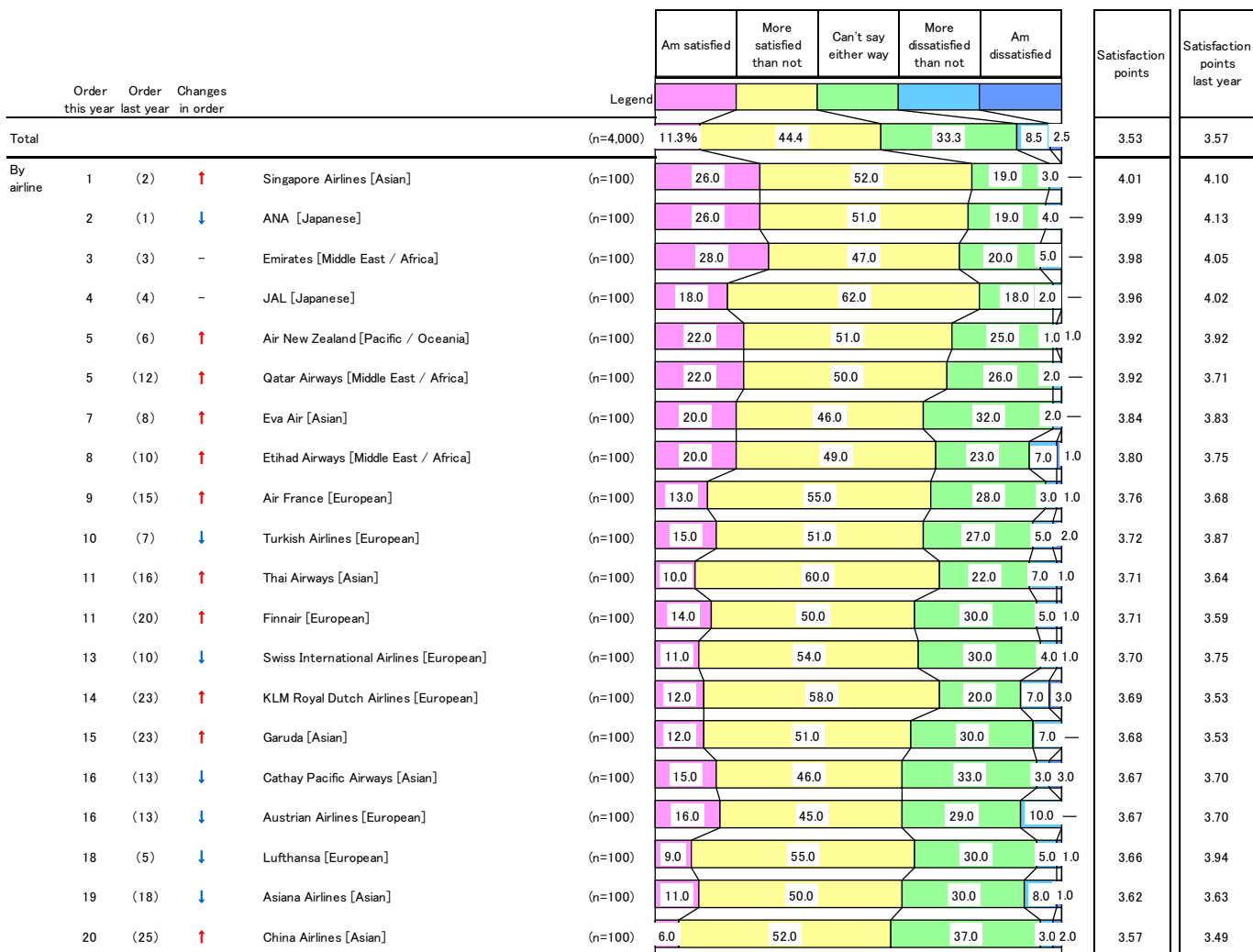
† Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.

## 2. Satisfaction by Attribute

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

- The total average of satisfaction with "Aircraft Equipment and Amenities" was 3.53 points.
- Singapore Airlines' 4.01 points enabled the airline to move from 2<sup>nd</sup> last year to the top spot. This was followed by ANA (3.99 points) and Emirates (3.98 points).
- Qatar Airways increased its figure to 3.92 points, moving up dramatically in the ranking from 12<sup>th</sup> last year to 5<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)



† 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.

#### ■ 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	Wi-Fi/Internet connection	Extent of in-flight amenities available	Comfort of toilets	Other	Nothing in particular
Reasons for satisfaction	2,227	35.5	36.0	23.5	5.5	20.2	12.0	1.2	25.6
Reasons for dissatisfaction	1,773	16.2	32.6	7.0	3.9	12.7	9.3	3.3	41.1

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

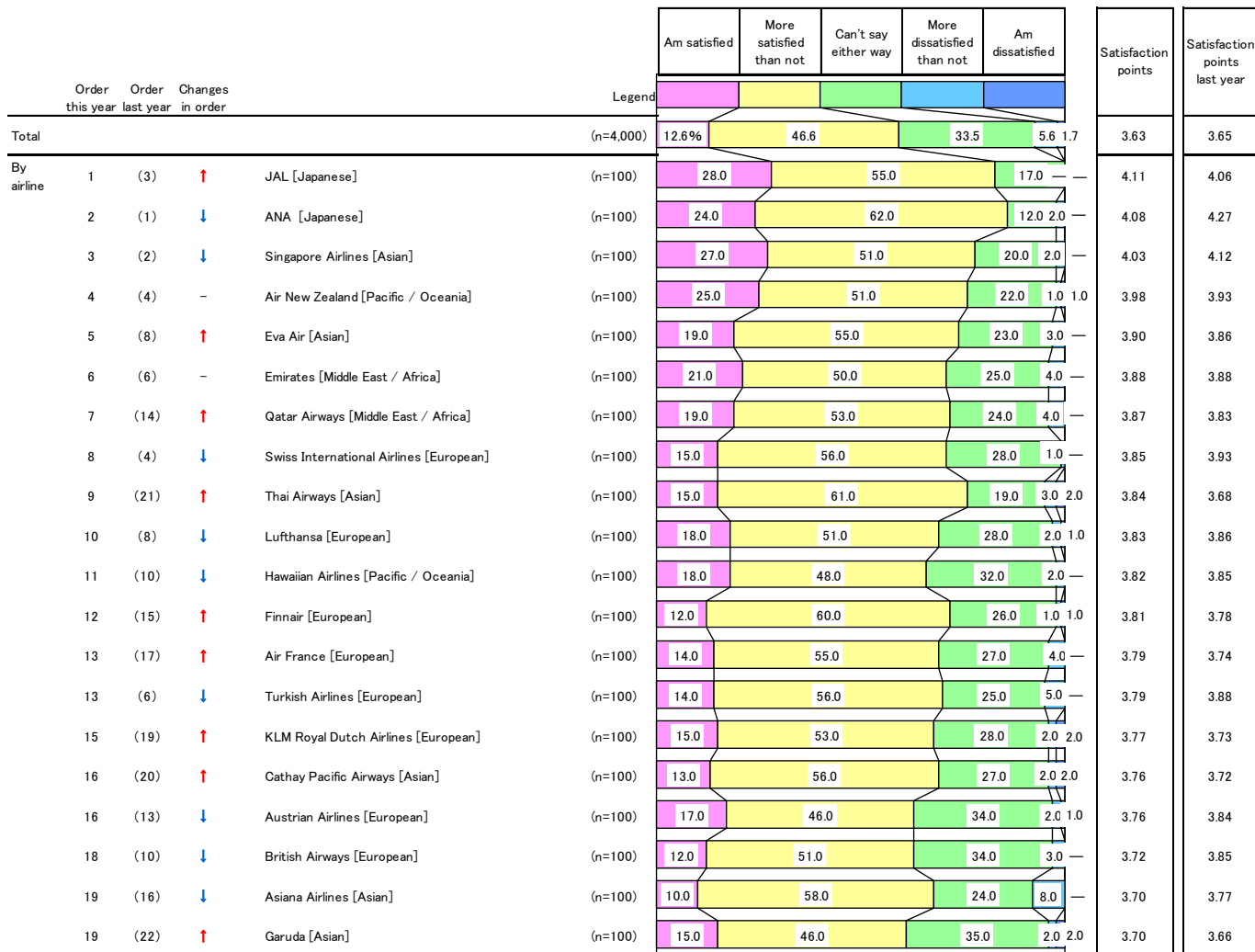
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

## 2. Satisfaction by Attribute

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

- The total average of satisfaction with the "service by cabin crew" was 3.63 points.
- At 4.11 points, JAL went from 3th place last year to the top spot this year. This was followed by ANA (4.08 points) and Singapore Airlines (4.03 points).
- Qatar Airways (3.87 points) went from 14<sup>th</sup> last year to 7<sup>th</sup> while the ranking of Thai Airways (3.84 points) shot up from 21<sup>st</sup> last year to 9<sup>th</sup>.
- The top reason for satisfaction and reason for dissatisfaction were both "Courtesy of response."

#### ■ Satisfaction with Service by Cabin 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.

#### ■ 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	2,370	22.5	57.7	24.1	15.6	1.6	20.4
Reasons for dissatisfaction	1,630	9.8	27.4	7.8	4.5	3.8	56.7

† "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."

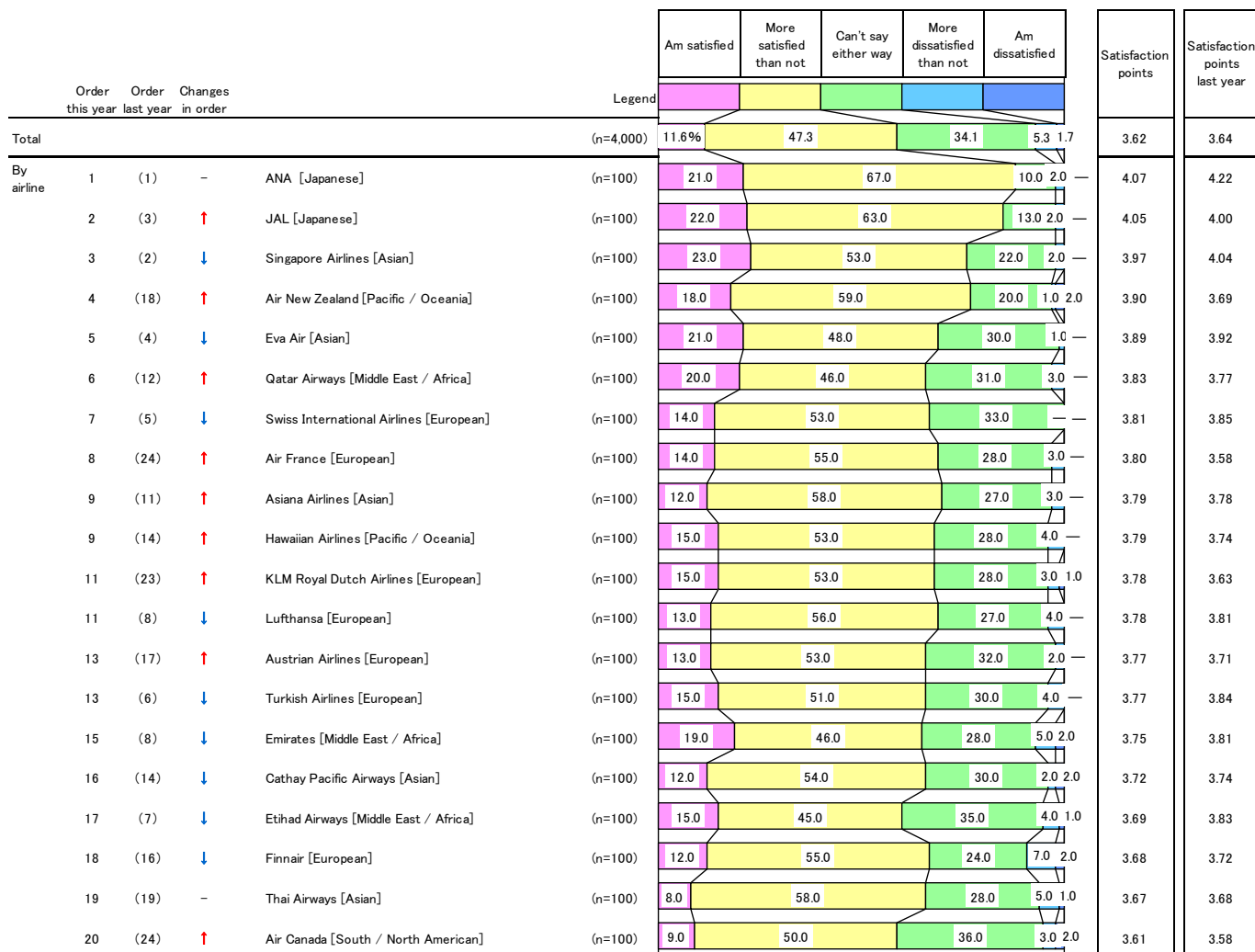


## 2. Satisfaction by Attribute

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

- The total average of satisfaction with the "service by ground crew" was 3.62 points.
- As was the case last year, ANA had the top spot at 4.07 points. This was followed by Japan Airlines (4.05 points) and Singapore Airlines (3.97 points).
- Air New Zealand (3.90 points) went from 18<sup>th</sup> place last to 4<sup>th</sup>, while Air France (3.80 points) shot up from 24<sup>th</sup> place to 8<sup>th</sup>.
- 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.

#### ■ 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	2,355	61.8	27.3	15.1	6.2	27.2
Reasons for dissatisfaction	1,645	22.8	12.3	6.8	3.8	59.5

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

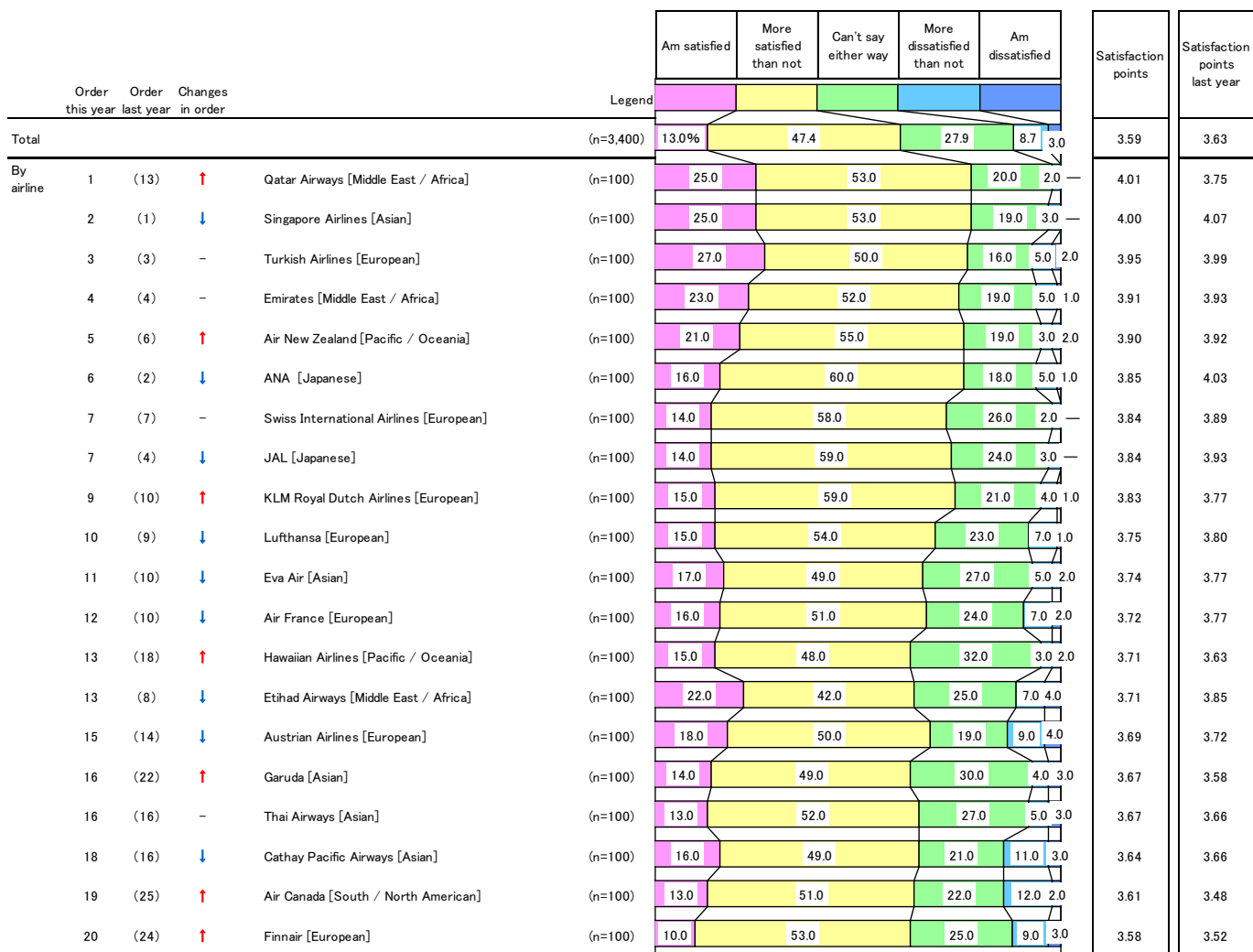
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

## 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 3.59 points.
- The top spot was occupied by Qatar Airways (4.01 points), which improved greatly on its 13<sup>th</sup> place finish last year. This was followed by Singapore Airlines (4.00 points) and Turkish Airlines (3.95 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.

† Vanilla Air, Peach Aviation, JetStar Airways, Air Asian X, Jeju Airport, and HK Express were excluded from the user tabulation because there were fewer than 80 users of each.

#### ■ 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	2,052	62.3	43.1	30.7	32.3	34.1	35.8	0.6	5.1
Reasons for dissatisfaction	1,348	56.4	12.7	9.9	4.0	7.0	11.8	2.6	26.6

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

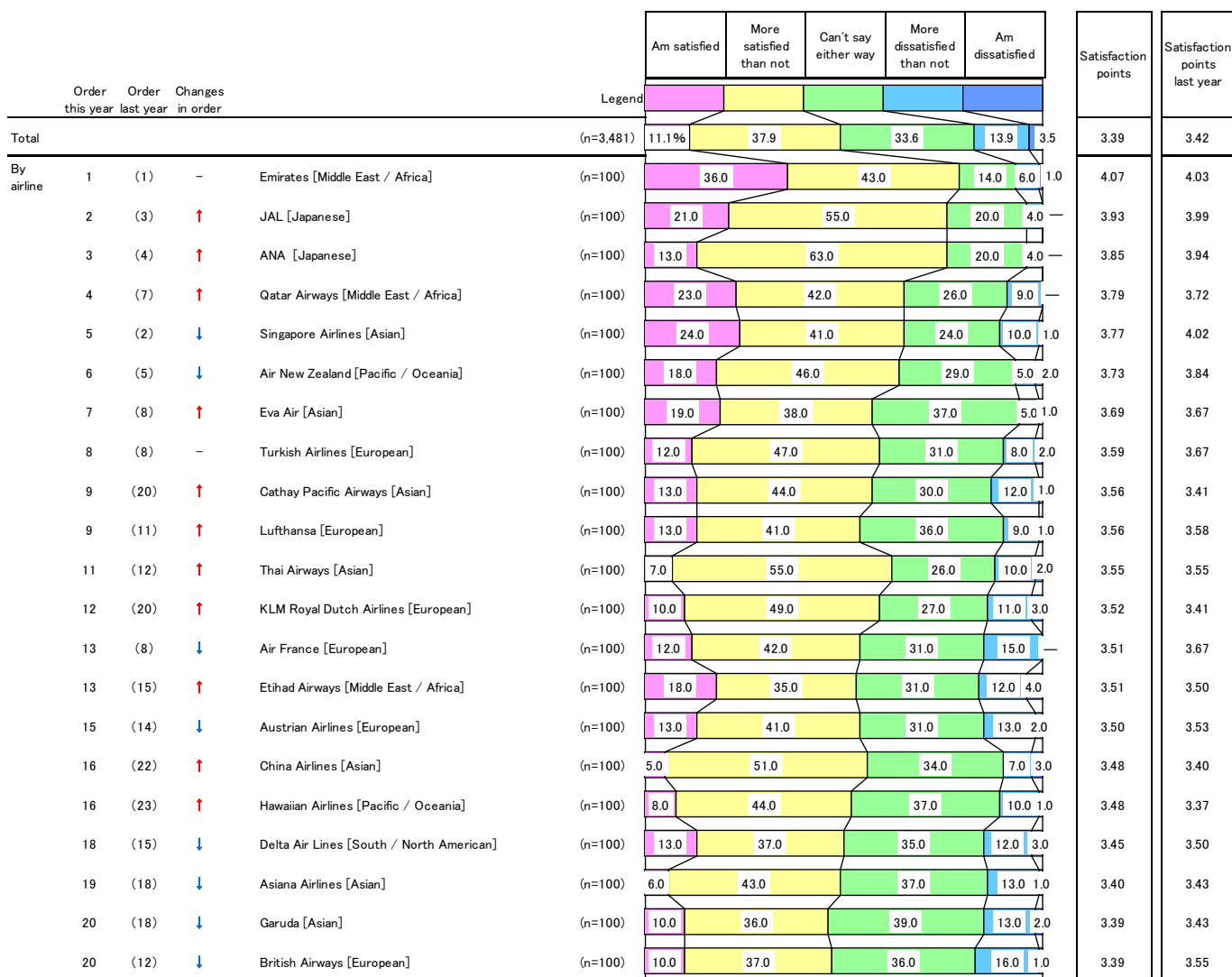
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

## 2. Satisfaction by Attribute

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

- The overall average degree of satisfaction with “in-flight entertainment” was 3.39 points, which was the lowest score among all five categories.
- As was the case last year, the top spot was taken by Emirates at 4.07 points. This was followed by Japan Airlines (3.93 points) and ANA (3.85 points), which meant that two Japanese airlines entered the top three.
- 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.

† Vanilla Air, Peach Aviation, Air Asian X, Jeju Airport, and HK Express were excluded from the user tabulation because there were fewer than 80 users of each.

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

Sample	Reasons for Satisfaction / Reasons for Dissatisfaction with In-flight Entertainment (in-flight entertainment users / Multiple Answer)													Nothing in particular (%)
	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		
Reasons for satisfaction	1,705	44.0	52.5	14.9	11.4	10.7	9.7	7.6	4.5	5.8	10.0	3.7	0.4	16.8
Reasons for dissatisfaction	1,776	24.3	36.5	7.0	8.3	5.0	6.8	5.7	2.6	3.4	5.6	2.3	4.2	36.8

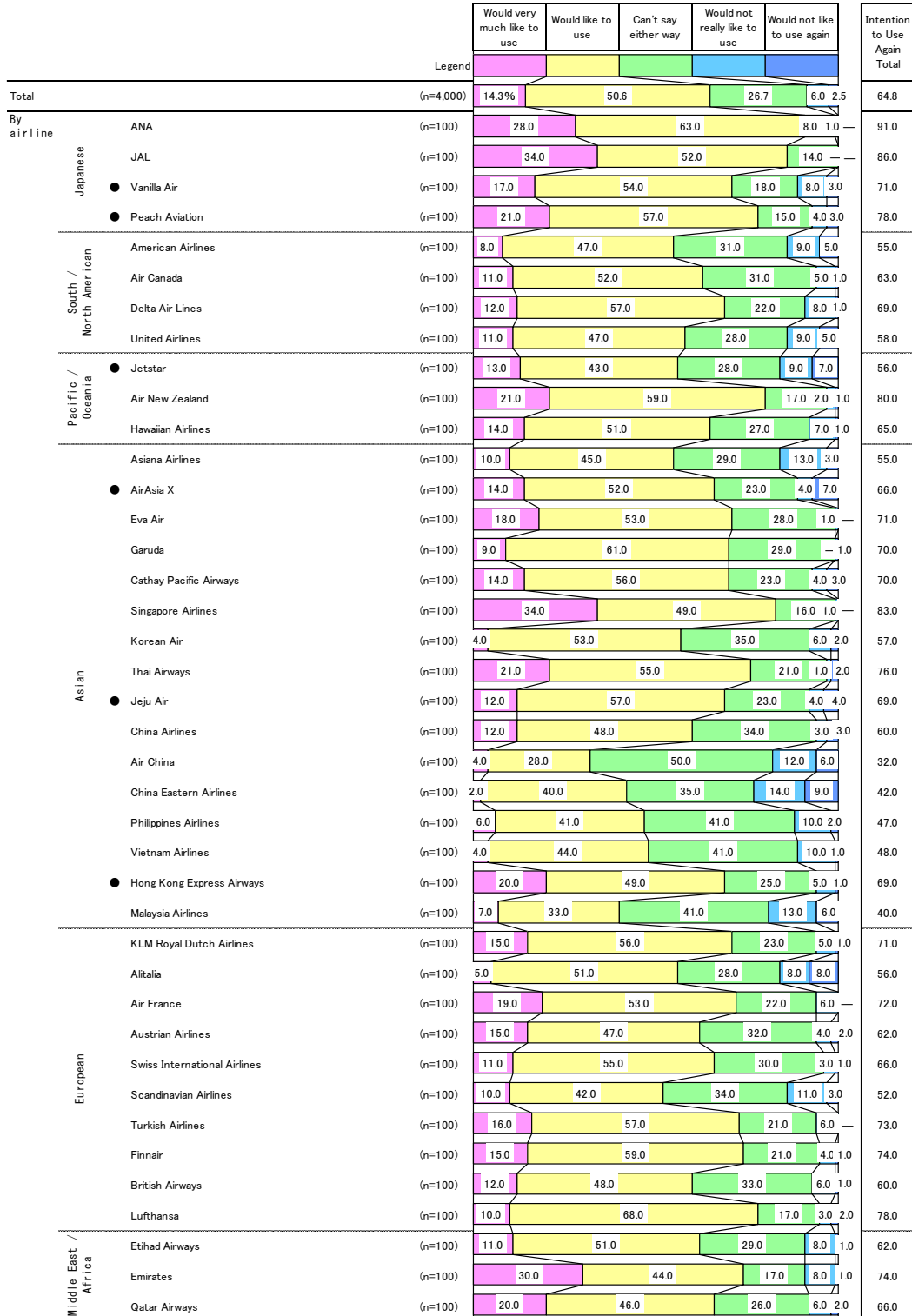
† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

† "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" was 14% and "Would like to use" was 51%) was 65%.
- A look by airline shows that in terms of the "intention to use again - total" ANA scored highest at 91%. This was followed by Japan Airlines (86%) and Singapore Airlines (83%).
- Among LCC, Peach Aviation scored 5<sup>th</sup> overall for "intention to use again - total" at 78%. Vanilla Air finished in 12<sup>th</sup> with 71%.

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



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

## 4. Airlines Desired for Future Use

● When respondents were asked about airlines they would like fly in the future, the highest percentage gave ANA (63%), which was also the case last year. This was followed by Japan Airlines (50%), which means that the two Japanese airlines maintained high levels of use intention.

● AMONG LCC, Peach Aviation (5%) was 8<sup>th</sup>.

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

Ranking	Airline	2015 Survey (%)		2014 Survey Ranking (n=4,000)		Rate of increase
		n=4,000	(%)	Ranking	(n=4,000)	
1	ANA [Japanese]	62.5	62.5	1	58.3	↑
2	JAL [Japanese]	49.8	49.8	2	44.8	↑
3	Singapore Airlines [Asian]	20.1	20.1	3	22.6	↓
4	Emirates [Middle East / Africa]	14.8	14.8	4	15.6	—
5	Lufthansa [European]	7.3	7.3	5	7.5	—
6	Air France [European]	6.5	6.5	6	7.2	—
7	Delta Air Lines [South / North American]	5.3	5.3	9	5.4	—
8	● Peach Aviation [Japanese]	4.9	4.9	7	7.0	↓
9	Cathay Pacific Airways [Asian]	4.8	4.8	14	3.8	↑
10	KLM Royal Dutch Airlines [European]	4.6	4.6	10	4.9	—
11	Thai Airways [Asian]	4.2	4.2	13	3.9	—
12	United Airlines [South / North American]	4.0	4.0	12	4.2	—
13	Qatar Airways [Middle East / Africa]	3.8	3.8	17	3.2	—
14	Finnair [European]	3.7	3.7	16	3.2	—
15	● Jetstar Japan	3.4	3.4	8	6.1	↓
16	Virgin Atlantic	3.0	3.0	11	4.6	↓
17	Qantas	2.6	2.6	23	2.2	—
18	Air New Zealand [Pacific / Oceania]	2.5	2.5	19	2.9	—
19	Air Canada [South / North American]	2.5	2.5	21	2.9	—
20	Hawaiian Airlines [Pacific / Oceania]	2.5	2.5	18	3.1	—
21	Swiss International Airlines [European]	2.4	2.4	27	2.0	—
22	● Vanilla Air [Japanese]	2.3	2.3	15	3.4	↓
23	British Airways [European]	2.2	2.2	28	1.9	—
24	● AirAsia Japan	2.1	2.1	*	*	*
25	Turkish Airlines [European]	1.9	1.9	26	2.1	—
27	American Airlines [South / North American]	1.9	1.9	29	1.7	—
27	Ethiad Airways [Middle East / Africa]	1.9	1.9	25	2.1	—
28	Korean Air [Asian]	1.8	1.8	22	2.6	—
29	◎ Star Flyer	1.8	1.8	24	2.2	—
30	Alitalia [European]	1.7	1.7	31	1.6	—
31	Austrian Airlines [European]	1.4	1.4	30	1.6	—
32	Asiana Airlines [Asian]	1.4	1.4	19	2.9	↓
33	Eva Air [Asian]	1.1	1.1	34	1.2	—
34	Scandinavian Airlines [European]	1.0	1.0	35	1.1	—
35	Malaysia Airlines [Asian]	0.8	0.8	39	0.9	—
35	China Airlines [Asian]	0.8	0.8	36	1.0	—
37	Air Tahiti Nui	0.7	0.7	37	1.0	—
38	Garuda [Asian]	0.7	0.7	38	1.0	—
39	Vietnam Airlines [Asian]	0.7	0.7	40	0.5	—
41	● Jetstar [Pacific / Oceania]	0.7	0.7	32	1.4	—
41	● Cebu Pacific Air	0.6	0.6	42	0.4	—
42	Philippines Airlines [Asian]	0.5	0.5	44	0.4	—
42	● AirAsia X [Asian]	0.5	0.5	33	1.2	—
44	● Hong Kong Express Airways [Asian]	0.5	0.5	52	0.2	—
45	China Eastern Airlines [Asian]	0.4	0.4	46	0.3	—
45	Aero Mexico	0.4	0.4	43	0.4	—
47	● Jeju Air [Asian]	0.4	0.4	41	0.5	—
48	● Thai AirAsia X	0.3	0.3	*	*	*
48	Aeroflot	0.3	0.3	54	0.2	—
50	Air China [Asian]	0.3	0.3	60	0.1	—
50	Air Caledonia International	0.3	0.3	48	0.3	—
50	US Airways	0.3	0.3	48	0.3	—
53	● Spring Airlines	0.2	0.2	51	0.3	—
54	Dragonair	0.2	0.2	58	0.1	—
56	● Scoot	0.2	0.2	44	0.4	—
56	● Jetstar Asia Airways	0.2	0.2	46	0.3	—
57	Bangkok Airways	0.1	0.1	*	*	*
57	SriLankan Airlines	0.1	0.1	48	0.3	—
59	Air Niugini	0.1	0.1	68	—	—
59	EgyptAir	0.1	0.1	56	0.2	—
61	South African Airways	0.1	0.1	*	*	*
61	China Southern Airlines	0.1	0.1	68	—	—
61	Hong Kong Airlines	0.1	0.1	60	0.1	—
61	Hainan Airlines	0.1	0.1	68	—	—
61	Air Macau	0.1	0.1	60	0.1	—
61	● TWay Airlines	0.1	0.1	68	—	—
61	● Jin Air	0.1	0.1	75	—	—
61	Ethiopian Airlines	0.1	0.1	*	*	*
61	● Air Busan	0.1	0.1	53	0.2	—
61	Iran Air	0.1	0.1	60	0.1	—
61	● Eastar Jet	0.1	0.1	54	0.2	—
72	Miat Mongolian Airlines	0.1	0.1	68	—	—
72	Aurora (previously SAT Airlines and Vladivostok Avia)	0.1	0.1	60	0.1	—
72	Air Berlin	0.1	0.1	*	*	*
75	Xiamen Air	—	—	75	—	—
75	Shanghai Airlines	—	—	59	0.1	—
75	TransAsia Airways	—	—	60	0.1	—
75	Siberia Airlines (S7 Airlines)	—	—	60	0.1	—
75	Jet Airways	—	—	*	*	*
75	Asian Air	—	—	*	*	*
81	Shenzhen Air	—	—	75	—	—
81	Juneyao Airlines	—	—	*	*	*
81	Shandong Airlines	—	—	75	—	—
81	Pakistan International Airlines	—	—	68	—	—
81	Jet Asia Airways	—	—	*	*	*
81	Air Indian	—	—	57	0.1	—
81	Uzbekistan Airways	—	—	75	—	—
81	Asia Atlantic Airlines	—	—	60	0.1	—
	Other	0.5	0.5	—	0.6	—
	Don't know	6.3	6.3	—	6.2	—

† 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 2015).

† 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 2014 survey and 2015 survey.

# Reference: From Results of the “2015 AB-ROAD Overseas Travel Survey”

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

### "2015 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 2014 (the month of departure being in 2014).

#### Timing

Mon. 23 Mar through Thu. 26 Mar, 2015

#### Research Method

Internet survey

#### Numbers Tabulated

5,000 respondents (respondents contacted: 7,992; samples collected: 5,225 (successful collection rate of: 65.4%))

#### 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+
0.527	0.876	1.036	1.751	0.946	0.801	0.666	1.381

#### 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."

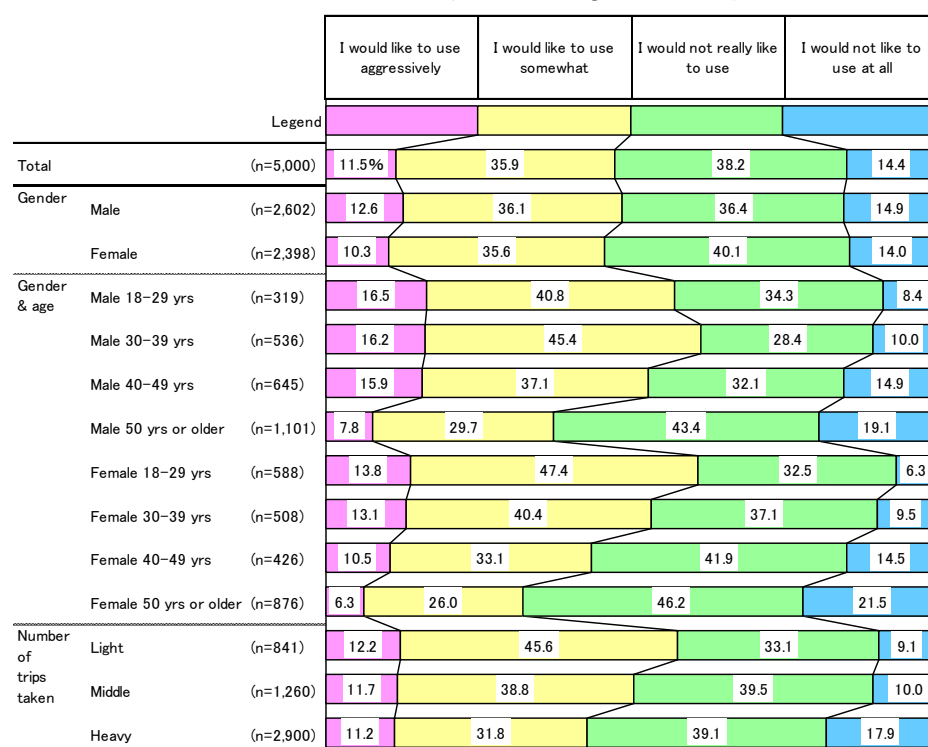
Light: Those who have traveled overseas one to three times before

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

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

- The intention to use low-cost carriers was 47%, including both “I would like to use aggressively” (12%) and “I would like to use somewhat” (36%).
- 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)



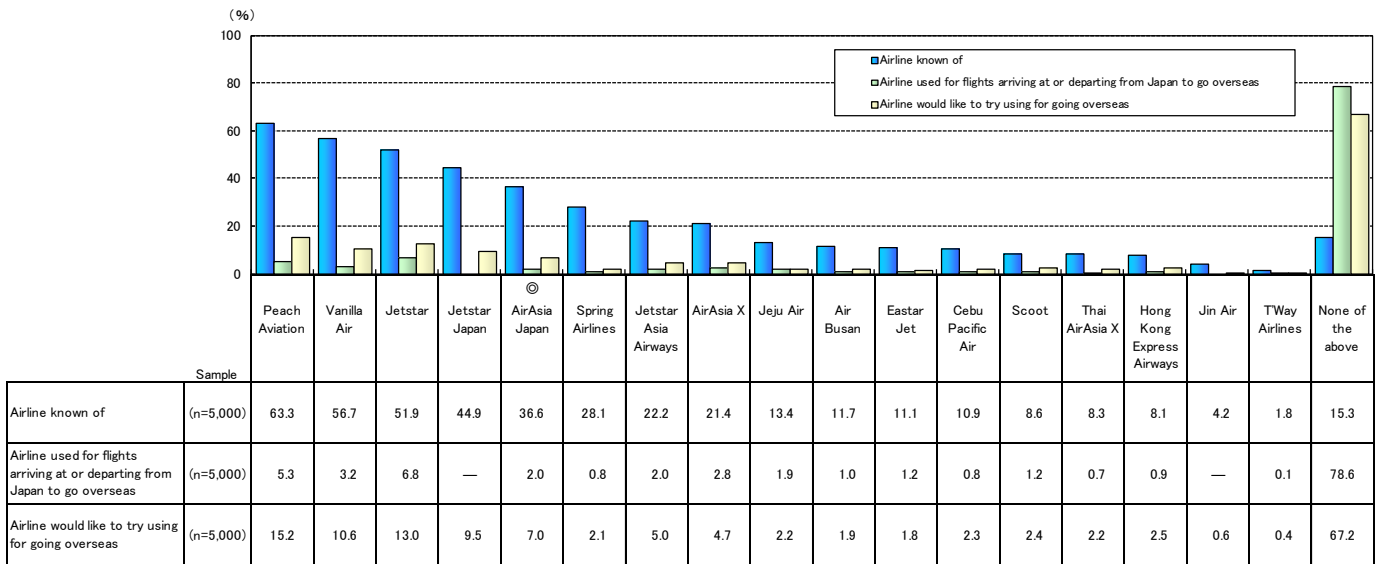
† Respondents were asked about their intention to use low-cost carriers when going overseas for travel/leisure purposes.

# Reference: From Results of the “2015 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 gave Peach Aviation (63%). This was followed by Vanilla Air (57%).
- In terms of ever-use of flights arriving at or departing from Japan to go overseas, Jetstar (7%) was given most. The percentage of those who have never used any LCC (the “None of the above” percentage) was less than 80%.
- When asked about the airlines they would like to use for future travel overseas, the highest percentage of respondents gave Peach Aviation (15%). This was followed by Jetstar (13%).

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

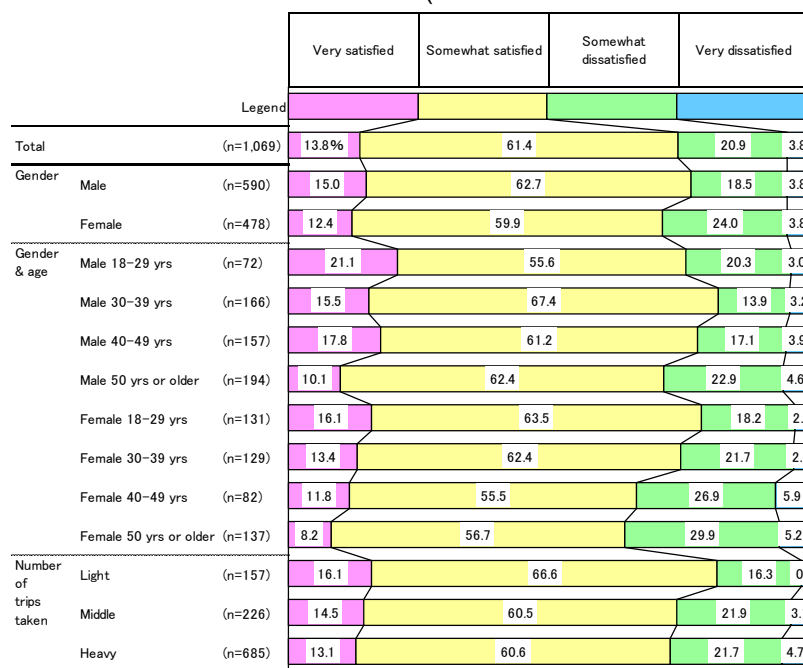


† "©" indicates airlines without international flights at the time of the study (Mar. 2015).

## Reference: From Results of the "2015 AB-ROAD Overseas Travel Survey" 2. Evaluations of Low-cost Carriers (LCC)

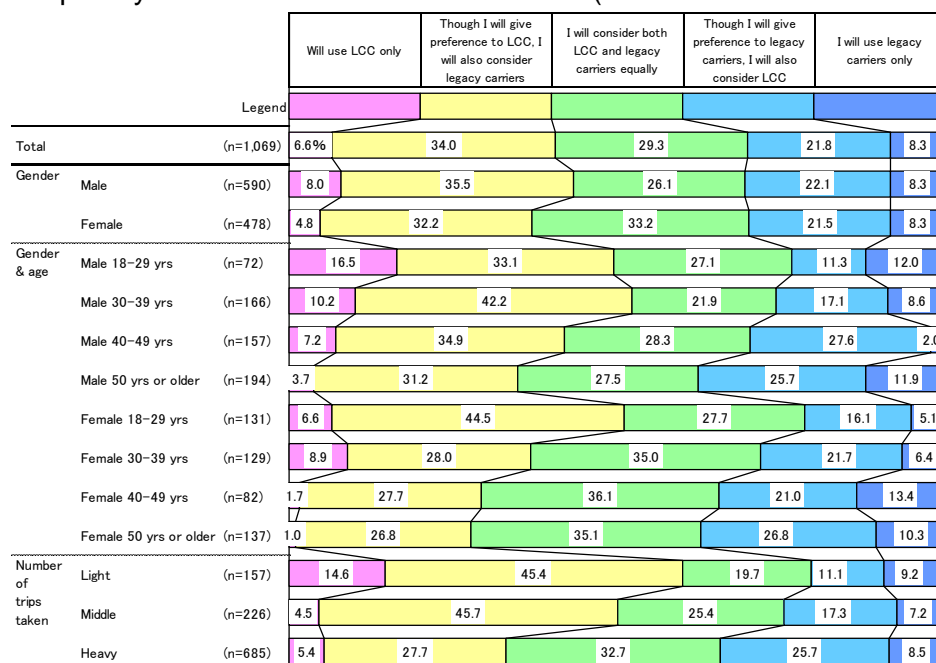
- The degree of satisfaction with use of low-cost carriers was 75%: "Very satisfied" (14%), "Somewhat satisfied" (61%).
- By demographic, the degree of satisfaction was low among females 40-49 years old and 50 years old and over (the combined "Very satisfied" and "Somewhat satisfied" scores were 67% and 65%, respectively).
- Regarding future priority use intention for low-cost carriers, the "Will use LCC only" score was 7%. The combined total with "Though I will give preference to LCC, I will also consider legacy carriers" 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 priority use intention for 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.



# Reference: From Results of the “2015 AB-ROAD Overseas Travel Survey”

## 3. Status of Mileage Program Membership

● For both the mileage program a member of and mileage program mainly used, ANA’s “ANA Mileage Club” was given more. This was followed by Japan Airlines’ “Mileage Bank.” The two changed places in the 2010 ranking.

### ■ Status of mileage program membership

- Mileage program a member of (Total / Multiple Answers)
- Mileage program mainly used (Total / Single Answer)

	Airline name	Name of mileage program	Mileage programs I belong to				My main mileage program			
			2015 (n=5,000)		2010 (n=5,280)		2015 (n=5,000)		2010 (n=5,280)	
			Ranking	(%)	Ranking	(%)	Ranking	(%)	Ranking	(%)
Japanese	ANA	ANA Mileage Club	1	54.5	2	55.7	1	33.3	2	28.4
	JAL	JAL Mileage Bank	2	52.0	1	61.0	2	26.3	1	34.2
South / North American	US Airways	Dividend Miles	22	0.4	*	*	13	0.1	*	*
	Aero Mexico	Club Premier	33	0.1	*	*	24	-	*	*
	American Airlines	Advantage	8	2.1	7	3.3	7	0.4	10	0.3
	Air Canada	Aeroplan	18	0.6	19	0.6	13	0.1	13	0.1
	Delta Air Lines	SkyMiles	3	15.0	*	*	3	4.3	*	*
	United Airlines	Mileage Plus	4	7.7	3	13.5	4	3.0	3	4.6
Pacific / Oceania	Air Tahiti Nui	Club Tiare	33	0.1	29	0.2	24	-	24	-
	Qantas	Qantas Frequent Flyer	16	0.8	14	1.3	13	0.1	13	0.1
	Air New Zealand	Airpoints	33	0.1	33	0.1	24	-	24	-
	Hawaiian Airlines	HawaiianMiles	17	0.7	*	*	13	0.1	*	*
Asian	Asiana Airlines	Asiana Club	9	1.8	9	2.2	7	0.4	10	0.3
	Uzbekistan Airways	UZAIRPLUS	33	0.1	*	*	24	-	*	*
	AirAsia X	BIG	22	0.4	*	*	24	-	*	*
	Eva Air	Infinity Mileage Land	27	0.3	22	0.5	24	-	24	-
	Garuda	Garuda Miles	22	0.4	19	0.6	13	0.1	13	0.1
	Cathay Pacific Airways	Asia Miles	7	2.3	6	3.6	10	0.3	8	0.4
	Jet Airways	JetPrivilege	33	0.1	*	*	24	-	*	*
	Spring Airlines	Spring Path	42	-	*	*	24	-	*	*
	Singapore Airlines	KrisFlyer	12	1.1	10	1.8	13	0.1	12	0.2
	Korean Air	SKYPASS	5	4.2	4	5.6	5	0.8	5	1.0
	Thai Airways	Royal Orchid Plus	14	1.0	12	1.7	10	0.3	8	0.4
	China Airlines	Dynasty Flyer Program	11	1.2	10	1.8	10	0.3	6	0.5
	Air China	PhoenixMiles	28	0.2	19	0.6	24	-	24	-
	China Eastern Airlines	Eastern Miles	28	0.2	16	0.7	24	-	13	0.1
	China Southern Airlines	Sky Pearl Club	28	0.2	29	0.2	24	-	13	0.1
	Pakistan International Airlines	Awards + Plus	42	-	*	*	24	-	*	*
	Philippines Airlines	Mabuhay Miles	22	0.4	15	0.9	13	0.1	13	0.1
	Vietnam Airlines	Golden Lotus Plus	28	0.2	27	0.3	24	-	24	-
	Malaysia Airlines	Enrich	22	0.4	25	0.4	24	-	24	-
	European	Air France	Flying Blue	6	3.0	5	4.2	6	0.7	4
KLM Royal Dutch Airlines		Aeroflot Bonus	33	0.1	*	*	24	-	*	*
Aeroflot Russian Airlines		MilleMiglia	15	0.9	13	1.4	13	0.1	13	0.1
Alitalia		Sky Gift	42	-	*	*	24	-	*	*
Iran Air		Flying Club	19	0.5	16	0.7	13	0.1	13	0.1
Virgin Atlantic		Miles & More	10	1.7	8	2.5	7	0.4	6	0.5
Lufthansa		Euro Bonus	33	0.1	25	0.4	24	-	13	0.1
Austrian Airlines		Miles & Smiles	33	0.1	27	0.3	24	-	24	-
Swiss International Airlines		Finnair Plus	19	0.5	22	0.5	13	0.1	24	-
Scandinavian Airlines		Executive Club	19	0.5	16	0.7	24	-	13	0.1
Turkish Airlines		Egypt Air Plus	42	-	29	0.2	24	-	24	-
Finnair		Etihad Airways	33	0.1	*	*	24	-	*	*
British Airways		Emirates	12	1.1	22	0.5	13	0.1	13	0.1
Middle East / Africa	EgyptAir	Privilege Club	28	0.2	29	0.2	24	-	24	-
	Etihad Airways	Voyager	42	-	*	*	24	-	*	*
	Emirates	Other		0.2		5.9		-		3.0
	Qatar Airways	Don't belong to a mileage program		28.3		22.9		28.3		22.9
	South African Airways									

† “\*”: No applicable data

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