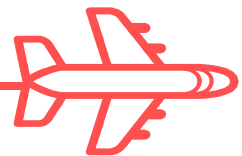


エィビ-ロード  
**AB-ROAD**

**2016**

**Market Survey Of  
Airline Satisfaction**



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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 2015.

## ○Respondents

The survey was done on 7,227 respondents selected from the INTAGE Net Monitors of INTAGE Inc. These were Japanese citizens aged 18 years and over who traveled overseas in the year 2015 (the month of departure being in 2015).

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

## ○Timing

Thu. 14 April through Tue. 19 April, 2016

## ○Research Method

Internet survey

## ○Tabulation Numbers

4,000 respondents (respondents contacted: 7,227, samples collected: 4,181s (successful collection rate of 57.9%))

\* 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, Qantas, Jetstar, Air New Zealand, Hawaiian Airlines, Asiana Airlines, AirAsia X, Eva Air, Garuda Indonesia, Cathay Pacific Airways, Singapore Airlines, SriLankan Airlines, Korean Air, Thai Airways, Jeju Air, China Airlines, Air China, China Eastern Airlines, TransAsia Airways, Philippines Airlines, Vietnam Airlines, Malaysia Airlines, KLM Royal Dutch Airlines, Alitalia, Air France, Austrian Airlines, Finnair, British Airways, Lufthansa, Etihad Airways, Emirates, Qatar Airways, Turkish Airlines

\* **The airlines included in this survey are the top 40 airlines used in the last trip taken in the year 2015, according to the results of the “2016 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.  
“2015 Airline Satisfaction Survey” - Timing: 16 April through 20 April 2015; Sample size tabulated: 4,000s (100 samples for each airline)
- (3) In this survey, respondents who in 2015 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.

## "2016 AB-ROAD Overseas Travel Survey" Outline

### ○Objective

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

### ○Respondents

Selected from the INTAGE Net Monitors of INTAGE Inc., these were Japanese citizens aged 18 years and over who traveled overseas in the year 2015 (the month of departure being in 2015).

### ○Timing

Tue. 22 Mar through Wed. 30 Mar, 2016

### ○Research Method

Internet survey

### ○Numbers Tabulated

4,802 respondents (respondents contacted: 7,883; samples collected:4,934 (successful collection rate of :62.6%))

### ○Method of Tabulation

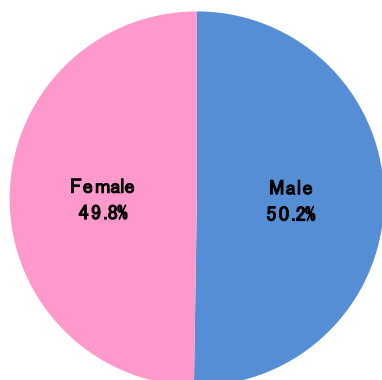
The survey results were weighted to correspond with the breakdown of leisure travelers (by gender and age).

The weightings used are as follows.

	18-29 yrs	30-39 yrs	40-49 yrs	50-59 yrs	60 yrs+
Male	0.7175579	1.0022098	1.2042349	0.9484497	1.2310514
Female	1.2349039	0.9952853	0.9173323	0.7756231	0.9790302

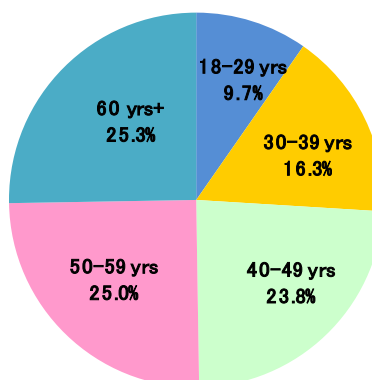
## 2. Profile of the Respondents

■ 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	2.6	2.6	50.5	3.3	47.1	3.0	10.9	20.9	18.0	2.9	3.5	1.3	4.9

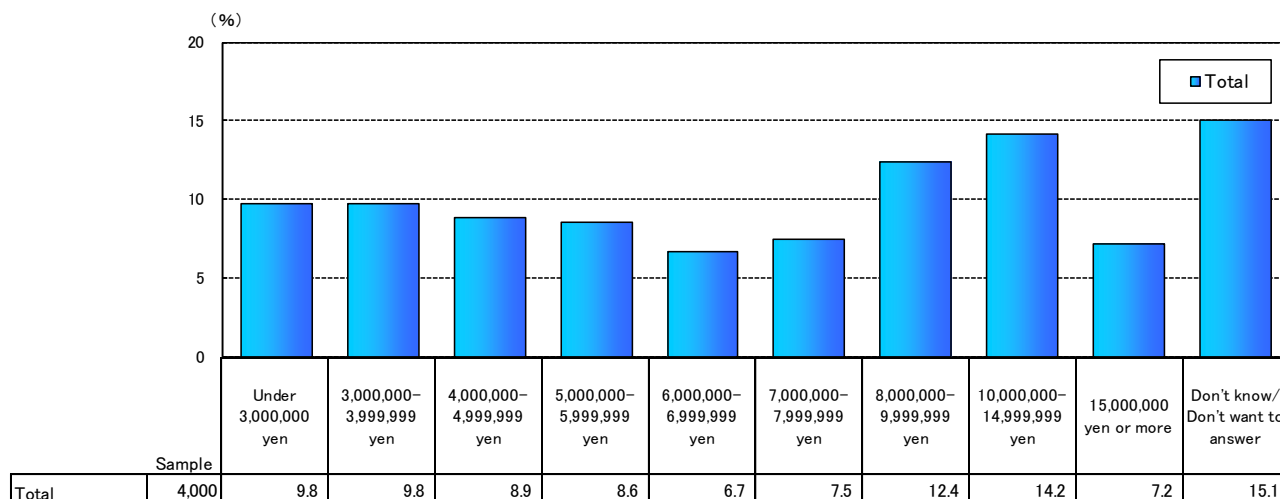
(%)

■ 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	14.3	9.2	4.1	3.5	13.1	5.0	5.9	3.1	4.0	8.2	2.4	15.0	11.2	1.2

(%)

■ Annual Household Income (Total / Single Answer)

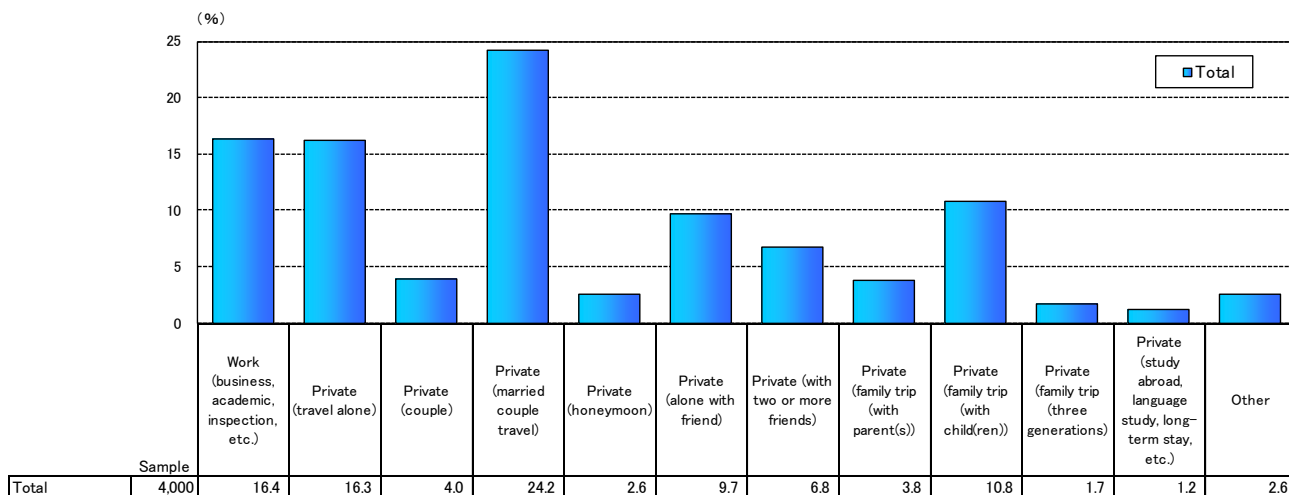


(%)

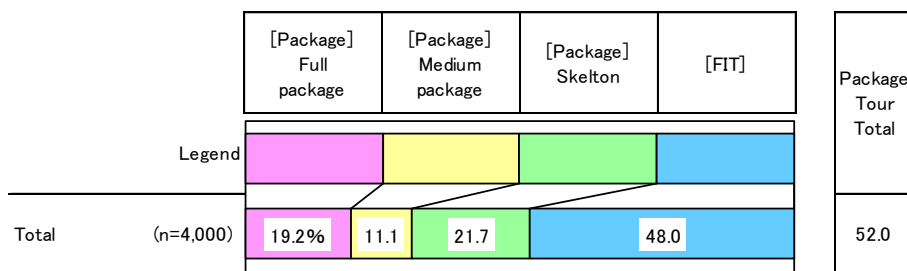
Sample

Total	4,000	9.8	9.8	8.9	8.6	6.7	7.5	12.4	14.2	7.2	15.1
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### ■ Purpose for Overseas Travel and Persons Accompanying (Total / Single Answer)

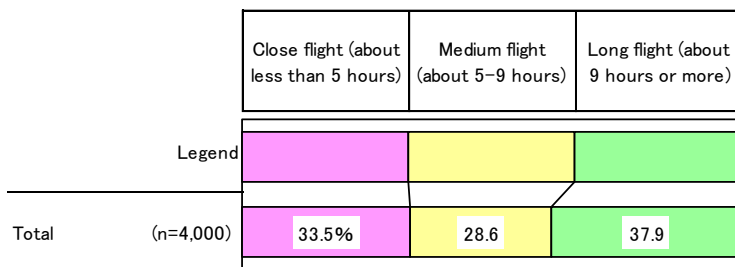


### ■ Overseas Travel Type (Total / Single Answer)

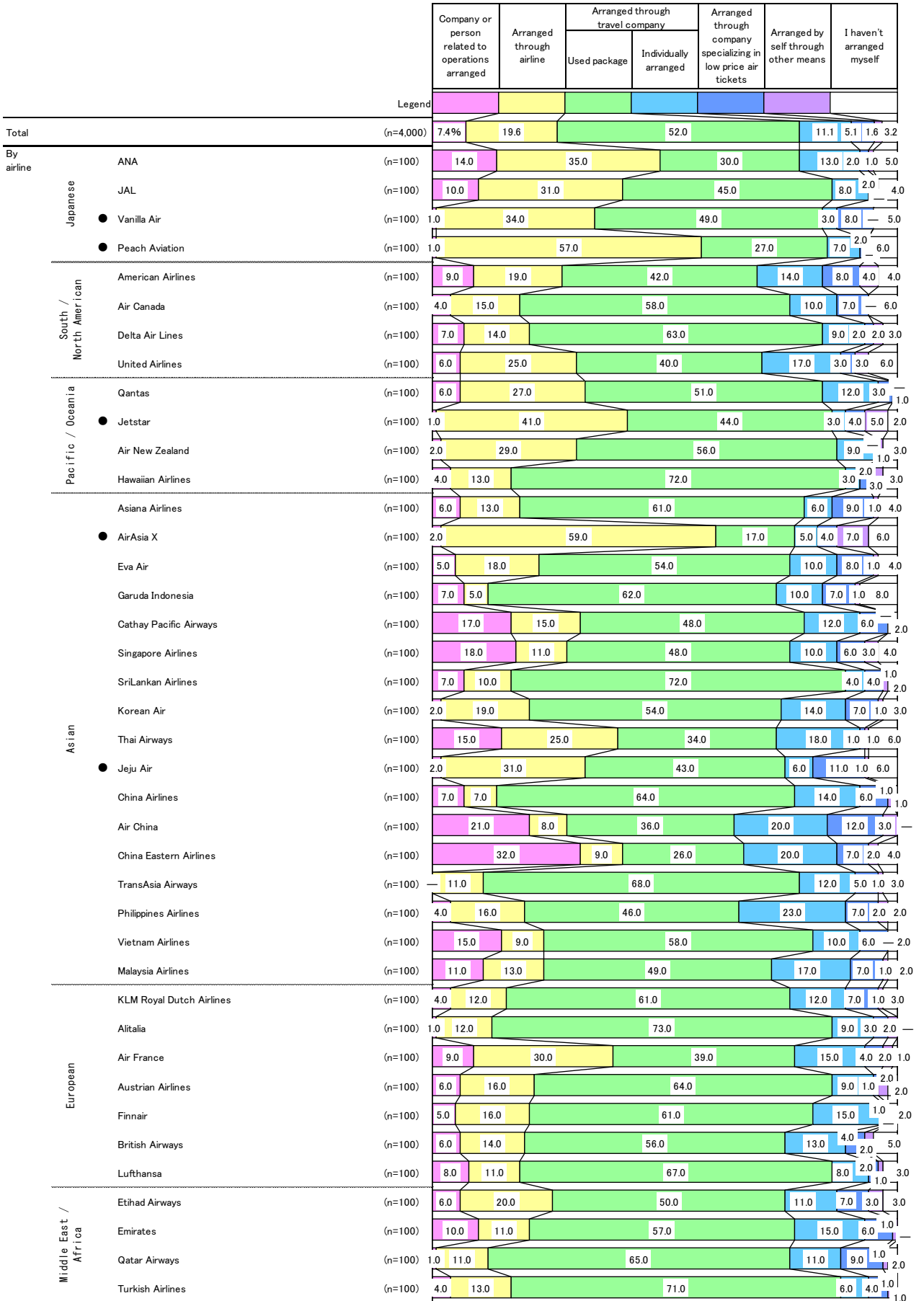


- † [Package] Full package : Tour that is scheduled with sightseeing, activities, and most meals
- [Package] Medium package : Tour that is scheduled with some sightseeing, activities, and meals, as well as tours with some free time
- [Package] Skelton : Tour that basically has free time at destinations,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

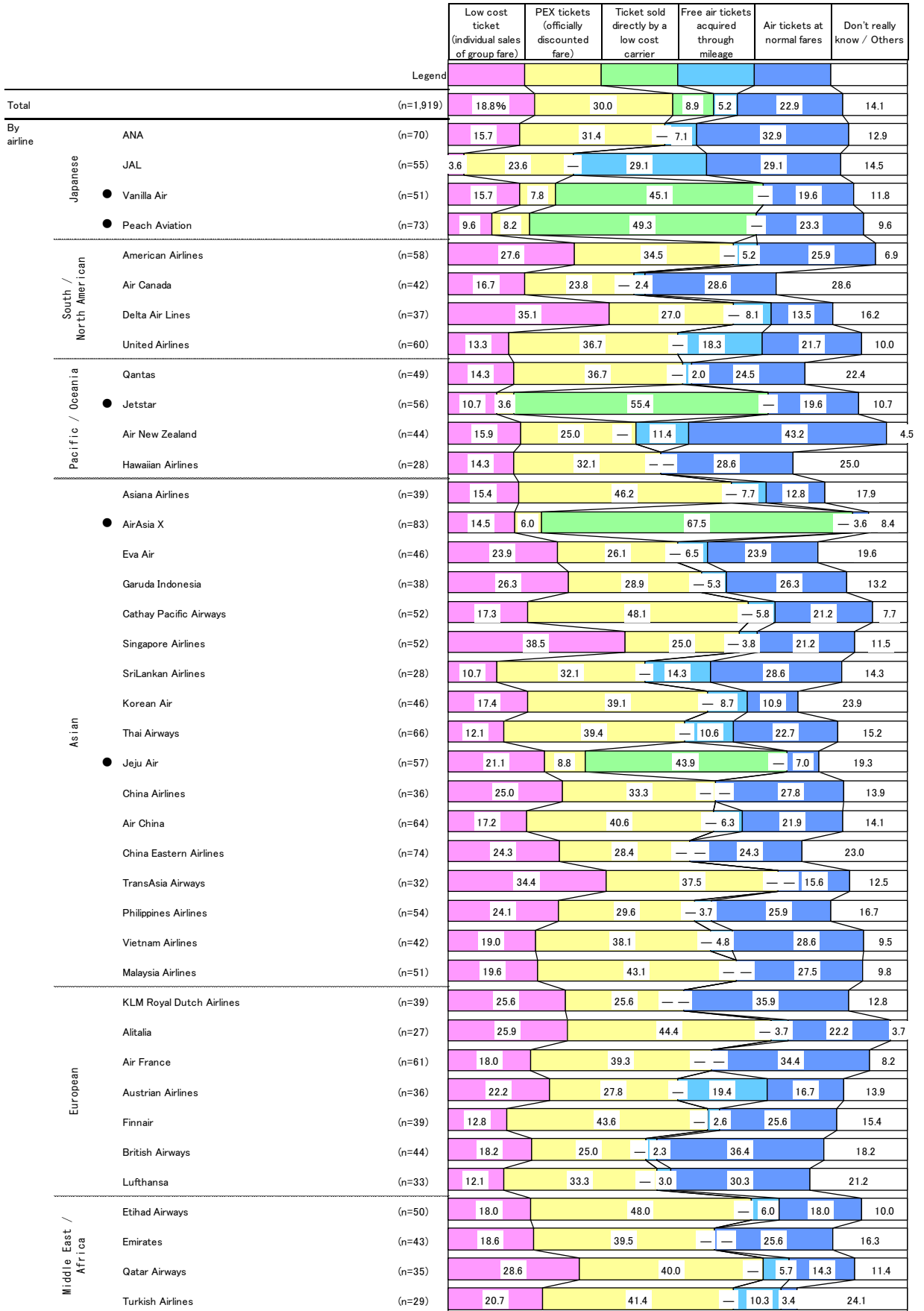


### Means of Arranging Air Tickets Used (Total / Single Answer)



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

■ Air Tickets Used (package tour non-users / Single Answer)



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

† Reference data for the airline because less than n=30



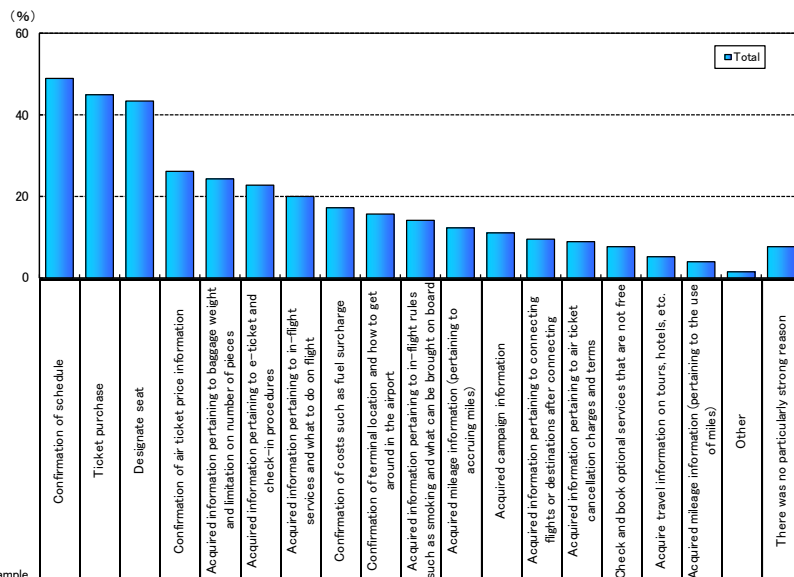
### Whether Airline Website Was Used When Making Overseas Travel (Total / Single Answer)

	Legend	Used		Period used		
		Used	Didn't use	Prior to booking	At time of booking	After booking
Total	(n=4,000)	57.1%	42.9	50.7	42.3	45.9
By airline						
● Peach Aviation [Japanese]	(n=100)	91.0	9.0	91.0	86.0	72.0
● AirAsia X [Asian]	(n=100)	88.0	12.0	87.0	86.0	78.0
● Vanilla Air [Japanese]	(n=100)	84.0	16.0	79.0	73.0	70.0
● Jetstar [Pacific / Oceania]	(n=100)	78.0	22.0	77.0	70.0	70.0
ANA [Japanese]	(n=100)	75.0	25.0	65.0	61.0	68.0
JAL [Japanese]	(n=100)	74.0	26.0	71.0	66.0	63.0
Etihad Airways [Middle East / Africa]	(n=100)	69.0	31.0	59.0	45.0	59.0
Qantas [Pacific / Oceania]	(n=100)	68.0	32.0	64.0	53.0	57.0
Air New Zealand [Pacific / Oceania]	(n=100)	65.0	35.0	57.0	47.0	48.0
SriLankan Airlines [Asian]	(n=100)	63.0	37.0	54.0	46.0	51.0
● Jeju Air [Asian]	(n=100)	63.0	37.0	62.0	53.0	48.0
Singapore Airlines [Asian]	(n=100)	62.0	38.0	53.0	41.0	49.0
Air France [European]	(n=100)	60.0	40.0	52.0	49.0	53.0
American Airlines [South / North American]	(n=100)	60.0	40.0	52.0	45.0	49.0
Korean Air [Asian]	(n=100)	59.0	41.0	56.0	51.0	47.0
Emirates [Middle East / Africa]	(n=100)	59.0	41.0	52.0	43.0	50.0
United Airlines [South / North American]	(n=100)	57.0	43.0	51.0	45.0	47.0
Philippines Airlines [Asian]	(n=100)	56.0	44.0	49.0	40.0	40.0
Hawaiian Airlines [Pacific / Oceania]	(n=100)	56.0	44.0	49.0	35.0	43.0
British Airways [European]	(n=100)	56.0	44.0	49.0	41.0	40.0
Asiana Airlines [Asian]	(n=100)	54.0	46.0	52.0	42.0	38.0
Air Canada [South / North American]	(n=100)	54.0	46.0	41.0	28.0	41.0
TransAsia Airways [Asian]	(n=100)	53.0	47.0	46.0	42.0	44.0
Delta Air Lines [South / North American]	(n=100)	53.0	47.0	46.0	32.0	43.0
Malaysia Airlines [Asian]	(n=100)	52.0	48.0	45.0	33.0	40.0
Thai Airways [Asian]	(n=100)	51.0	49.0	45.0	41.0	40.0
Cathay Pacific Airways [Asian]	(n=100)	49.0	51.0	40.0	34.0	38.0
KLM Royal Dutch Airlines [European]	(n=100)	49.0	51.0	42.0	35.0	45.0
Alitalia [European]	(n=100)	49.0	51.0	39.0	29.0	35.0
Austrian Airlines [European]	(n=100)	48.0	52.0	40.0	23.0	39.0
Qatar Airways [Middle East / Africa]	(n=100)	48.0	52.0	41.0	25.0	35.0
Finnair [European]	(n=100)	48.0	52.0	44.0	31.0	40.0
Eva Air [Asian]	(n=100)	45.0	55.0	37.0	32.0	32.0
China Airlines [Asian]	(n=100)	45.0	55.0	40.0	28.0	32.0
Turkish Airlines [Middle East / Africa]	(n=100)	44.0	56.0	34.0	27.0	37.0
Garuda Indonesia [Asian]	(n=100)	43.0	57.0	31.0	23.0	35.0
China Eastern Airlines [Asian]	(n=100)	42.0	58.0	38.0	34.0	35.0
Air China [Asian]	(n=100)	41.0	59.0	38.0	31.0	33.0
Vietnam Airlines [Asian]	(n=100)	40.0	60.0	35.0	24.0	24.0
Lufthansa [European]	(n=100)	32.0	68.0	24.0	21.0	27.0

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

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

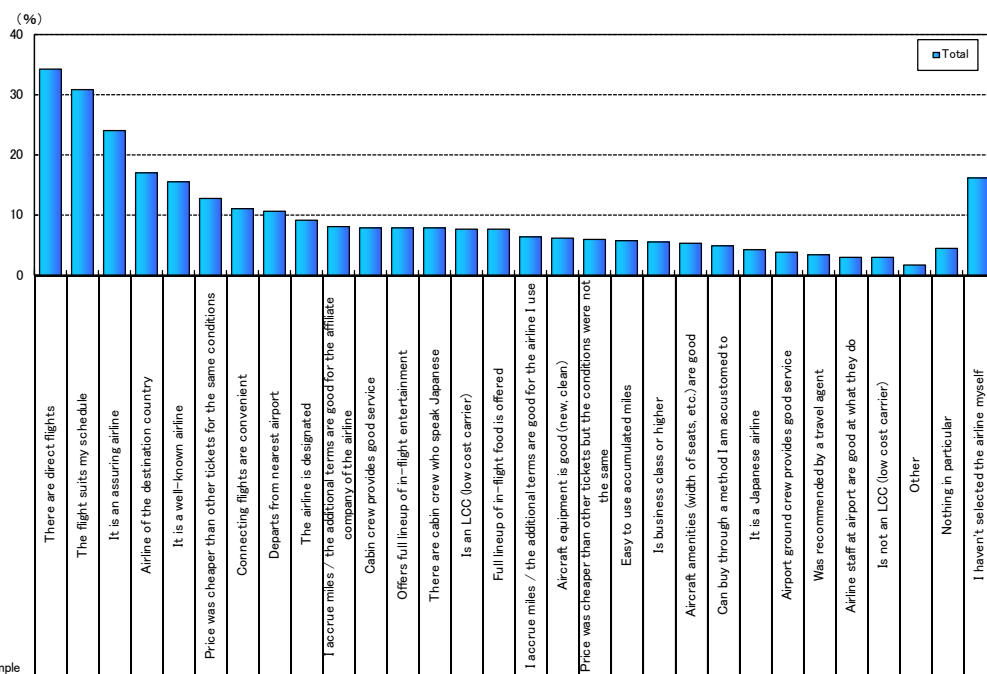
Reason for Using Airline Website (Airline website user / Multiple Answer)



Sample		(%)																				
Total		(n=2,283)	49.3	45.2	43.6	26.3	24.3	22.8	20.0	17.2	15.9	14.1	12.4	11.3	9.6	9.0	7.9	5.2	4.0	1.6	7.7	
By airline	ANA [Japanese]	(n=75)	58.7	54.7	66.7	25.3	16.0	20.0	13.3	20.0	12.0	14.7	13.3	12.0	4.0	9.3	4.0	10.7	9.3	—	8.0	
	JAL [Japanese]	(n=74)	48.6	54.1	58.1	17.6	10.8	16.2	12.2	16.2	1.4	5.4	17.6	18.9	2.7	5.4	2.7	9.5	6.8	1.4	5.4	
	● Vanilla Air [Japanese]	(n=84)	57.1	67.9	46.4	27.4	26.2	27.4	10.7	20.2	11.9	16.7	2.4	16.7	2.4	15.5	17.9	3.6	2.4	—	3.6	
	● Peach Aviation [Japanese]	(n=91)	58.2	81.3	41.8	38.5	24.2	17.6	6.6	19.8	14.3	13.2	1.1	17.6	4.4	14.3	13.2	3.3	—	—	—	5.5
	American Airlines [South / North American]	(n=60)	51.7	40.0	46.7	26.7	20.0	21.7	18.3	15.0	15.0	11.7	21.7	5.0	15.0	11.7	3.3	5.0	6.7	1.7	6.7	
	Air Canada [South / North American]	(n=54)	44.4	31.5	37.0	31.5	37.0	27.8	27.8	20.4	20.4	20.4	13.0	13.0	18.5	7.4	5.6	5.6	—	3.7	3.7	
	Delta Air Lines [South / North American]	(n=53)	62.3	24.5	58.5	15.1	17.0	34.0	18.9	9.4	11.3	11.3	22.6	7.5	7.5	5.7	1.9	—	7.5	1.9	9.4	
	United Airlines [South / North American]	(n=57)	50.9	42.1	61.4	12.3	17.5	21.1	17.5	5.3	19.3	12.3	17.5	14.0	10.5	1.8	5.3	1.8	8.8	1.8	3.5	
	Qantas [Pacific / Oceania]	(n=68)	58.8	47.1	42.6	36.8	30.9	29.4	27.9	25.0	23.5	26.5	14.7	13.2	13.2	13.2	16.2	10.3	8.8	—	4.4	
	● Jetstar [Pacific / Oceania]	(n=78)	51.3	79.5	44.9	42.3	39.7	28.2	23.1	24.4	15.4	26.9	2.6	19.2	10.3	20.5	3.2	2.6	1.3	2.6	3.8	
	Air New Zealand [Pacific / Oceania]	(n=65)	50.8	49.2	43.1	32.3	29.2	29.2	24.6	18.5	21.5	15.4	16.9	21.5	9.2	15.4	9.2	13.8	4.6	1.5	4.6	
	Hawaiian Airlines [Pacific / Oceania]	(n=56)	42.9	30.4	53.6	21.4	26.8	25.0	25.0	10.7	10.7	12.5	19.6	12.5	14.3	5.4	5.4	5.4	8.9	—	5.4	
	Asiana Airlines [Asian]	(n=54)	29.6	46.3	40.7	24.1	7.4	16.7	1.9	9.3	11.1	9.3	5.6	5.6	5.6	1.9	1.9	3.7	—	—	16.7	
	● AirAsia X [Asian]	(n=88)	58.0	84.1	52.3	38.6	28.4	30.7	11.4	20.5	12.5	12.5	1.1	14.8	8.0	13.6	23.9	3.4	2.3	1.1	6.8	
	Eva Air [Asian]	(n=45)	48.9	37.8	46.7	26.7	26.7	28.9	17.8	24.4	17.8	17.8	13.3	4.4	—	8.9	2.2	2.2	4.4	2.2	11.1	
	Garuda Indonesia [Asian]	(n=43)	46.5	18.6	25.6	20.9	25.6	20.9	34.9	18.6	14.0	14.0	14.0	—	11.6	7.0	2.3	2.3	2.3	—	16.3	
	Cathay Pacific Airways [Asian]	(n=49)	42.9	38.8	61.2	24.5	8.2	22.4	16.3	10.2	8.2	4.1	6.1	6.1	2.0	2.0	2.0	2.0	2.0	2.0	18.4	
	Singapore Airlines [Asian]	(n=62)	56.5	32.3	41.9	14.5	21.0	14.5	32.3	8.1	16.1	9.7	8.1	11.3	6.5	9.7	4.8	6.5	1.6	1.6	4.8	
	SriLankan Airlines [Asian]	(n=63)	44.4	38.1	41.3	33.3	38.1	33.3	31.7	25.4	34.9	33.3	27.0	17.5	22.2	19.0	15.9	15.9	19.0	1.6	3.2	
	Korean Air [Asian]	(n=59)	35.6	39.0	30.5	18.6	20.3	18.6	6.8	13.6	8.5	5.1	3.4	3.4	5.1	5.1	3.4	1.7	1.7	1.7	18.6	
	Thai Airways [Asian]	(n=51)	47.1	58.8	54.9	23.5	11.8	17.6	5.9	17.6	9.8	5.9	5.9	2.0	9.8	2.0	3.9	3.9	3.9	3.9	5.9	
	● Jeju Air [Asian]	(n=63)	46.0	60.3	27.0	34.9	15.9	20.6	3.2	15.9	4.8	7.9	3.2	19.0	1.6	11.1	7.9	1.6	—	—	15.9	
	China Airlines [Asian]	(n=45)	35.6	33.3	31.1	15.6	8.9	24.4	11.1	13.3	13.3	4.4	2.2	8.9	—	2.2	—	11.1	—	2.2	8.9	
	Air China [Asian]	(n=41)	43.9	41.5	29.3	22.0	17.1	9.8	12.2	14.6	7.3	9.8	14.6	7.3	12.2	9.8	2.4	2.4	—	—	7.3	
	China Eastern Airlines [Asian]	(n=42)	50.0	42.9	26.2	21.4	16.7	28.6	9.5	11.9	9.5	11.9	9.5	4.8	7.1	11.9	7.1	7.1	4.8	—	14.3	
	TransAsia Airways [Asian]	(n=53)	41.5	39.6	39.6	35.8	24.5	20.8	20.8	26.4	22.6	15.1	9.4	15.1	3.8	11.3	7.5	9.4	3.8	1.9	9.4	
	Philippines Airlines [Asian]	(n=56)	41.1	39.3	23.2	30.4	14.3	10.7	8.9	17.9	8.9	8.9	8.9	7.1	—	7.1	3.6	—	3.6	—	12.5	
	Vietnam Airlines [Asian]	(n=40)	57.5	25.0	22.5	30.0	27.5	20.0	17.5	15.0	7.5	15.0	12.5	5.0	5.0	2.5	2.5	2.5	2.5	2.5	7.5	
	Malaysia Airlines [Asian]	(n=52)	50.0	42.3	42.3	26.9	25.0	19.2	19.2	23.1	9.6	15.4	1.9	11.5	13.5	3.8	7.7	9.6	—	3.8	13.5	
	KLM Royal Dutch Airlines [European]	(n=49)	51.0	36.7	49.0	22.4	38.8	12.2	26.5	12.2	18.4	28.6	24.5	6.1	12.2	—	8.2	2.0	—	—	8.2	
	Alitalia [European]	(n=49)	34.7	34.7	38.8	22.4	28.6	26.5	26.5	28.6	10.2	14.3	12.2	8.2	14.3	6.1	6.1	4.1	2.0	2.0	8.2	
	Air France [European]	(n=60)	63.3	55.0	58.3	35.0	36.7	33.3	16.7	23.3	30.0	15.0	25.0	8.3	21.7	13.3	8.3	1.7	5.0	—	6.7	
	Austrian Airlines [European]	(n=48)	47.9	18.8	27.1	16.7	31.3	22.9	45.8	10.4	18.8	12.5	18.8	8.3	12.5	4.2	8.3	2.1	2.1	8.3	6.3	
Finnair [European]	(n=48)	47.9	35.4	39.6	22.9	20.8	29.2	33.3	20.8	29.2	6.3	6.3	12.5	16.7	8.3	8.3	10.4	2.1	4.2	4.2		
British Airways [European]	(n=56)	53.6	33.9	50.0	21.4	32.1	19.6	28.6	8.9	23.2	16.1	17.9	12.5	7.1	5.4	5.4	8.9	—	—	7.1		
Lufthansa [European]	(n=32)	46.9	37.5	34.4	21.9	31.3	18.8	25.0	9.4	21.9	6.3	15.6	9.4	9.4	9.4	3.1	6.3	3.1	3.1	3.1		
Ethiad Airways [Middle East / Africa]	(n=69)	49.3	42.0	46.4	29.0	30.4	27.5	30.4	18.8	24.6	15.9	23.2	13.0	17.4	10.1	4.3	1.4	7.2	4.3	7.2		
Emirates [Middle East / Africa]	(n=59)	42.4	25.4	45.8	11.9	27.1	22.0	37.3	13.6	27.1	20.3	20.3	8.5	16.9	8.5	5.1	3.4	3.4	3.4	10.2		
Qatar Airways [Middle East / Africa]	(n=48)	50.0	29.2	39.6	25.0	27.1	18.8	33.3	16.7	22.9	18.8	20.8	10.4	25.0	8.3	2.1	6.3	—	2.1	2.1		
Turkish Airlines [Middle East / Africa]	(n=44)	45.5	31.8	36.4	22.7	27.3	11.4	34.1	15.9	13.6	13.6	4.5	11.4	4.5	2.3	2.3	2.3	2.3	2.3	6.8		

† ● indicates a low-cost carrier (LCC)

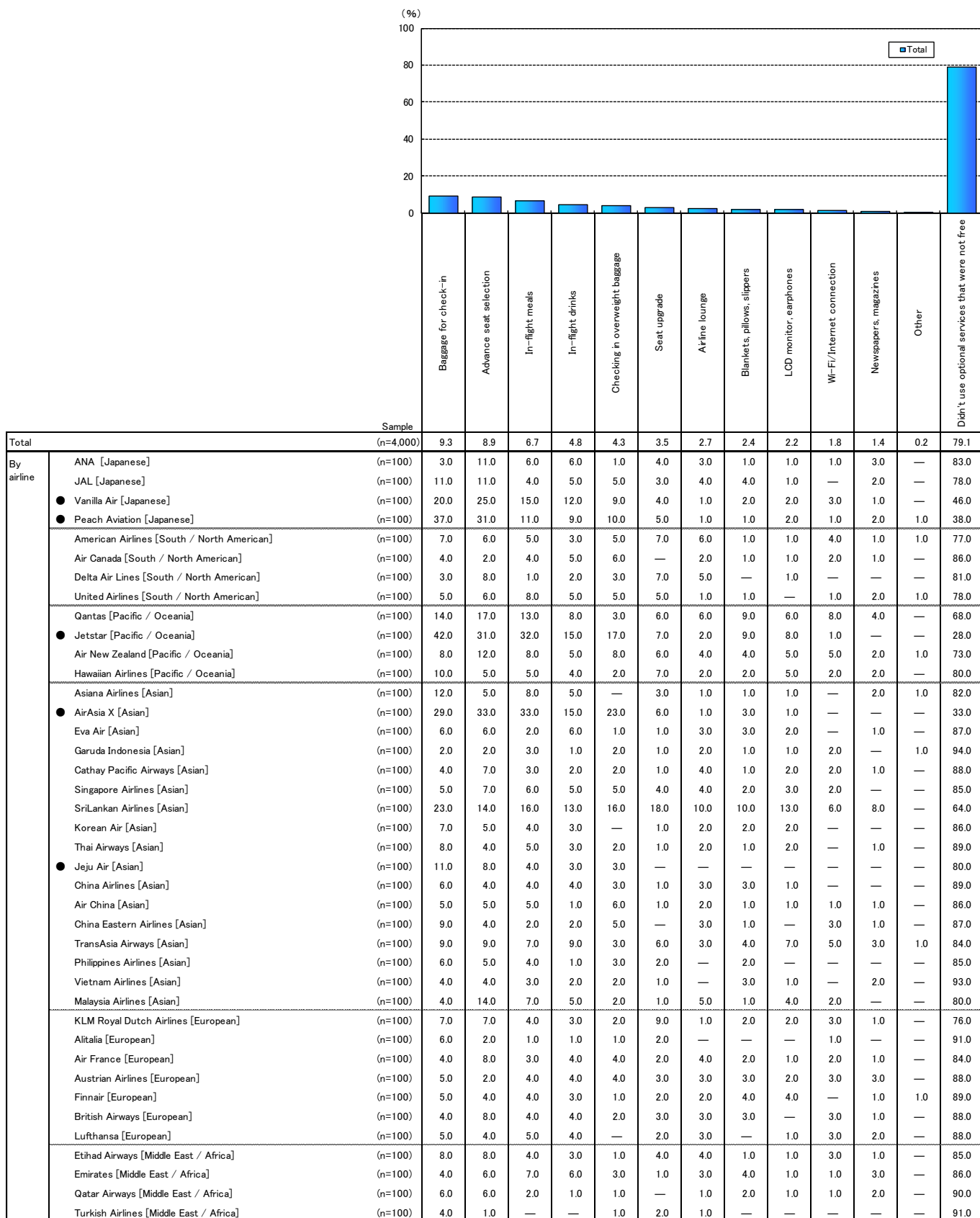
■ Items of Importance When Choosing Airline (Total / Multiple Answer)



Sample																															
Total (n=4,000)		34.2	30.9	24.0	17.1	15.6	12.7	11.1	10.7	9.1	8.0	7.9	7.8	7.8	7.7	7.7	6.3	6.2	6.0	5.7	5.5	5.4	5.0	4.2	3.8	3.5	3.0	2.9	1.8	4.4	16.1
Gender	Male (n=2,010)	33.8	31.3	24.3	17.9	16.3	12.7	11.2	10.0	8.0	9.0	8.5	7.3	8.0	8.2	7.9	6.4	6.5	6.2	7.1	7.1	6.0	5.4	5.2	3.8	2.9	3.5	3.1	1.9	4.6	14.5
	Female (n=1,990)	34.7	30.4	23.6	16.2	14.9	12.7	11.0	11.4	10.1	6.9	7.3	8.3	7.5	7.2	7.6	6.2	5.8	5.7	4.3	3.9	4.7	4.5	3.3	3.8	4.0	2.4	2.8	1.8	4.2	17.6
Age	18-29 yrs (n=386)	28.0	26.7	29.5	8.8	16.3	13.7	10.9	9.8	8.0	4.9	5.2	7.8	6.5	12.7	5.7	6.2	2.6	7.3	5.7	2.6	1.6	4.9	4.9	4.4	5.2	2.6	1.6	0.3	4.1	16.6
	30-39 yrs (n=653)	32.9	31.9	24.3	11.8	17.8	15.3	10.3	10.0	7.0	6.6	6.7	10.7	8.0	9.0	7.7	5.7	5.7	6.0	5.1	2.3	4.9	3.8	4.9	4.3	3.7	3.1	3.2	1.5	6.1	13.0
	40-49 yrs (n=950)	34.0	34.6	23.6	13.9	15.7	15.2	11.4	11.2	7.2	9.3	7.3	8.1	6.1	8.2	7.9	7.7	7.2	7.5	7.4	5.9	6.3	5.5	4.1	2.9	2.0	2.1	3.4	1.6	5.1	13.2
	50-59 yrs (n=999)	39.5	34.8	25.1	21.7	15.9	12.4	13.1	13.1	7.2	9.9	10.0	8.6	7.7	7.0	8.6	7.2	8.0	5.9	6.6	7.7	6.5	5.4	4.9	4.3	2.9	3.9	3.2	2.1	4.2	12.4
	60 yrs or older (n=1,012)	32.4	24.3	20.8	22.0	13.5	8.6	9.6	8.6	14.3	6.8	8.2	4.8	9.7	5.2	7.5	4.4	5.1	4.1	3.7	6.1	5.1	4.8	3.0	3.5	4.6	2.9	2.6	2.6	3.0	24.1
Area of residence	Kanto (n=2,018)	36.0	32.1	23.6	17.7	15.3	13.6	11.2	9.3	9.2	9.4	8.2	8.6	7.6	6.7	8.0	7.8	6.4	6.0	6.6	6.6	6.1	4.5	4.8	3.9	2.8	3.1	3.5	2.4	4.2	15.5
	Kansai (n=834)	32.3	32.7	23.4	14.0	14.3	11.8	11.0	12.7	8.4	5.8	6.6	5.9	7.1	9.8	6.4	4.2	5.2	5.9	4.0	3.5	4.2	5.5	3.6	3.2	5.0	2.3	2.5	1.0	4.9	17.3
	Tokai (n=437)	32.3	27.7	22.9	17.2	15.6	10.5	10.1	13.7	10.8	7.3	6.6	7.1	8.0	7.6	7.8	5.3	6.9	6.6	7.1	5.5	4.8	6.2	3.9	2.7	3.9	2.3	1.6	0.9	5.0	16.2
Travel type	Package (n=2,081)	28.4	22.2	21.9	15.0	15.7	6.7	7.9	8.6	15.0	5.7	7.4	6.7	8.1	4.2	7.4	4.0	5.2	3.2	3.8	4.5	4.2	2.3	3.7	4.2	5.3	3.3	2.7	1.1	4.6	26.1
	Full package (n=769)	19.8	12.1	19.6	14.7	13.8	2.1	7.2	6.4	16.6	5.6	6.6	5.2	8.6	2.6	7.8	2.9	3.9	1.8	2.1	4.3	3.9	1.2	3.4	3.9	6.4	3.1	1.3	1.6	3.9	38.1
	Medium package (n=444)	29.3	23.9	24.5	14.2	18.5	4.5	7.7	7.7	18.0	7.7	8.8	8.6	10.6	4.7	8.6	4.3	5.6	2.0	5.6	5.0	5.0	2.5	4.3	5.6	6.5	4.7	3.8	0.7	4.7	24.5
	Skelton (n=868)	35.6	30.2	22.6	15.8	15.9	11.9	8.6	11.1	12.1	4.8	7.3	7.0	6.3	5.4	6.6	4.8	6.2	5.0	4.4	4.5	4.1	3.2	3.6	3.8	3.8	2.8	3.5	0.8	5.2	16.4
	FIT (n=1,919)	40.5	40.3	26.2	19.3	15.5	19.2	14.6	12.9	2.6	10.4	8.5	9.0	7.4	11.5	8.0	8.8	7.2	9.0	7.8	6.6	6.6	7.9	4.8	3.3	1.5	2.6	3.1	2.7	4.2	5.1
Accompanying traveler	Travel alone (n=653)	36.0	34.0	24.8	17.8	15.6	17.8	14.4	10.9	6.6	8.6	7.4	10.0	7.8	13.5	11.3	7.8	7.5	10.0	7.7	4.3	5.5	9.3	4.1	4.4	2.3	3.2	4.7	2.0	4.1	8.7
	With spouse/partner/on honeymoon (n=1,233)	30.7	27.6	23.7	17.4	16.1	9.2	11.0	9.1	11.8	7.7	8.0	7.1	7.3	6.4	7.5	5.9	5.6	4.5	4.9	7.3	6.1	3.5	3.7	3.8	3.6	2.5	2.5	1.6	4.3	18.9
	With friend (n=658)	34.0	29.3	22.6	15.0	15.3	13.2	9.4	10.3	12.0	5.0	6.4	6.5	6.5	8.7	5.8	3.0	6.1	4.1	3.6	3.5	4.0	4.0	3.0	3.5	5.9	3.2	2.6	1.4	4.3	18.2
	Family travel (n=651)	37.5	30.6	22.1	16.9	15.4	13.4	9.8	12.1	8.3	7.8	9.1	9.5	8.6	7.7	7.1	7.4	5.8	7.2	5.5	4.0	3.7	4.5	4.5	3.5	1.8	3.1	2.2	2.3	4.8	17.4
Travel class	Is business class or higher (n=543)	33.5	35.0	36.3	21.5	21.7	8.8	16.9	11.2	9.4	15.7	19.9	13.4	9.8	3.9	21.9	11.2	16.6	4.6	12.3	39.4	18.6	6.1	8.3	10.7	4.1	8.7	4.1	1.7	2.4	7.4
	Economy class (n=3,457)	34.3	30.2	22.0	16.4	14.6	13.3	10.2	10.6	9.0	6.7	6.0	6.9	7.4	8.3	5.5	5.5	4.5	6.2	4.7	0.2	3.3	4.8	3.6	2.7	3.4	2.1	2.7	1.9	4.7	17.4



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



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

## **Part 2: Airline Evaluations**



# 1. Overall Satisfaction: Top 20

- The overall satisfaction total average was 3.69 points.
- Like last year, the top scorer this year was Singapore Airlines: 4.32 points. Second place was ANA (4.14 points) and was followed by KLM (4.04 points), which increased its standing significantly from 15th place last year.
- Austrian Airline (3.90 points) went last year from 21st place to 9th place, while British Airways (3.87 points) jumped up last year from 23rd place to 10th place.

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

				Am satisfied	More satisfied than not	Can't say either way	More dissatisfied than not	Am dissatisfied	Satisfaction points	Satisfaction points last year	
Order this year	Order last year	Changes in order		Legend							
<b>Total</b>				(n=4,000)	14.7%	51.4	24.8	7.0	2.2	3.69	3.70
<b>By airline</b>				(n=100)							
1	(1)	-	Singapore Airlines [Asian]	(n=100)	38.0	56.0	6.0			4.32	4.20
2	(3)	↑	ANA [Japanese]	(n=100)	28.0	59.0	12.0	1.0		4.14	4.09
3	(15)	↑	KLM Royal Dutch Airlines [European]	(n=100)	21.0	64.0	13.0	2.0		4.04	3.81
4	(4)	-	Air New Zealand [Pacific / Oceania]	(n=100)	28.0	53.0	14.0	4.0	1.0	4.03	4.02
4	(5)	↑	Emirates [Middle East / Africa]	(n=100)	29.0	52.0	14.0	3.0	2.0	4.03	4.01
4	(2)	↓	JAL [Japanese]	(n=100)	24.0	57.0	17.0	2.0		4.03	4.18
7	(10)	↑	Thai Airways [Asian]	(n=100)	18.0	63.0	14.0	3.0	2.0	3.92	3.92
7	(12)	↑	Air France [European]	(n=100)	21.0	57.0	17.0	3.0	2.0	3.92	3.87
9	(21)	↑	Austrian Airlines [European]	(n=100)	24.0	49.0	20.0	7.0		3.90	3.73
10	(8)	↓	Qatar Airways [Middle East / Africa]	(n=100)	15.0	59.0	24.0	2.0		3.87	3.95
10	(23)	↑	British Airways [European]	(n=100)	18.0	52.0	29.0	1.0		3.87	3.67
12	(5)	↓	Eva Air [Asian]	(n=100)	16.0	57.0	23.0	4.0		3.85	4.01
13	(18)	↑	Cathay Pacific Airways [Asian]	(n=100)	11.0	68.0	16.0	4.0	1.0	3.84	3.77
14	(8)	↓	Finnair [European]	(n=100)	16.0	57.0	22.0	4.0	1.0	3.83	3.95
15	(26)	↑	Asiana Airlines [Asian]	(n=100)	11.0	60.0	25.0	3.0	1.0	3.77	3.60
15	(14)	↓	Etihad Airways [Middle East / Africa]	(n=100)	25.0	40.0	26.0	5.0	4.0	3.77	3.83
17	*	*	Qantas [Pacific / Oceania]	(n=100)	21.0	45.0	26.0	5.0	3.0	3.76	*
18	(21)	↑	Garuda Indonesia [Asian]	(n=100)	13.0	54.0	26.0	7.0		3.73	3.73
18	(20)	↑	China Airlines [Asian]	(n=100)	6.0	66.0	23.0	5.0		3.73	3.74
18	(7)	↓	Turkish Airlines [Middle East / Africa]	(n=100)	13.0	58.0	20.0	7.0	2.0	3.73	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.

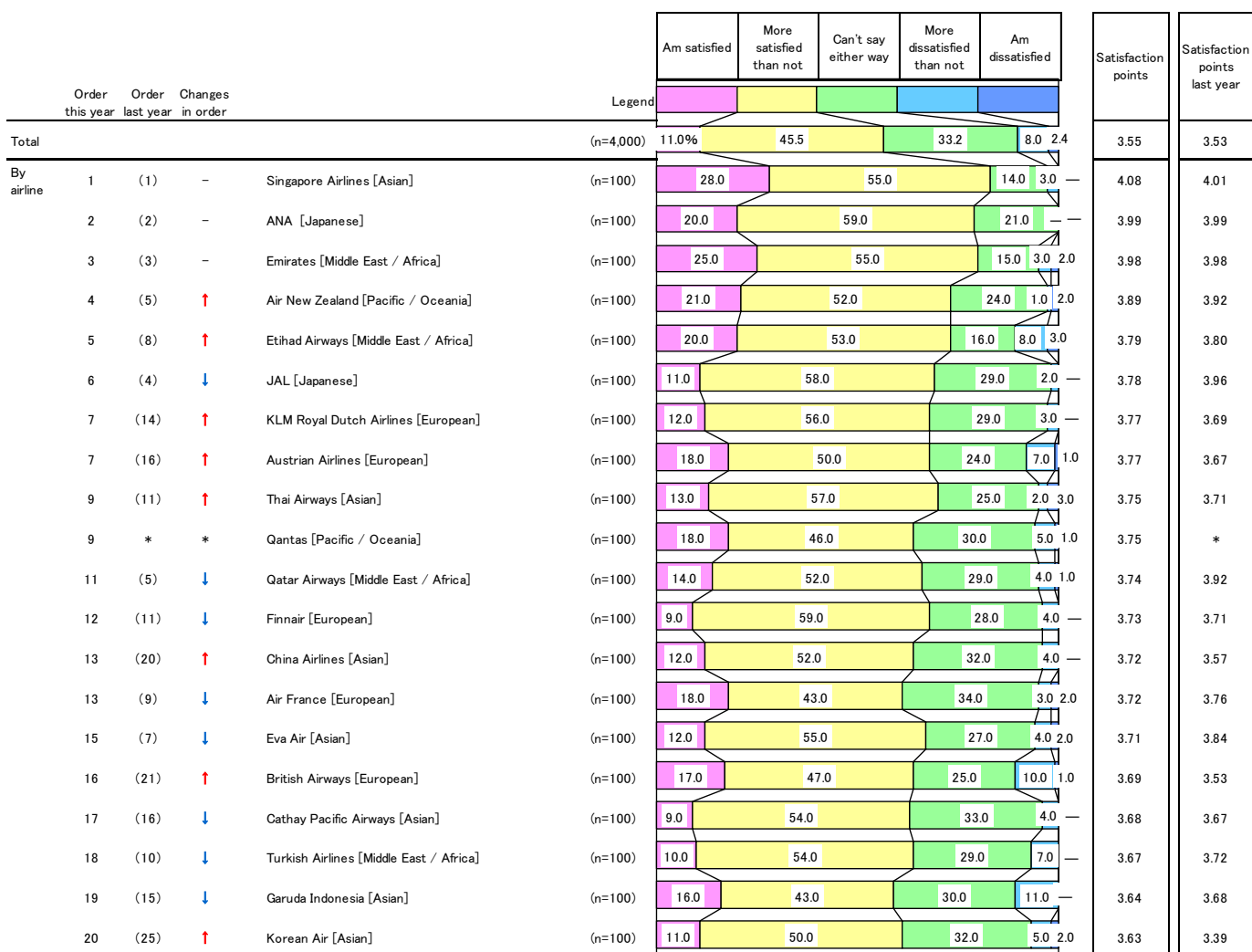
† Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.

## 2. Satisfaction by Attribute

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

- The total average of satisfaction with "Aircraft Equipment and Amenities" was 3.55 points.
- The TOP3 was the same as last year: Singapore Airlines (4.08 points) was followed by ANA (3.99 points) and Emirates (3.98 points).
- KLM (3.77 points) went last year from 14th place to 7th place, while Austrian Airline (3.77 points) went last year from 16th place to 7th place.
- 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	2,260	38.4	37.8	26.1	5.8	19.9	11.8	0.9	22.6
Reasons for dissatisfaction	1,740	14.9	31.0	7.8	6.1	12.6	9.5	2.9	43.5

† "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."

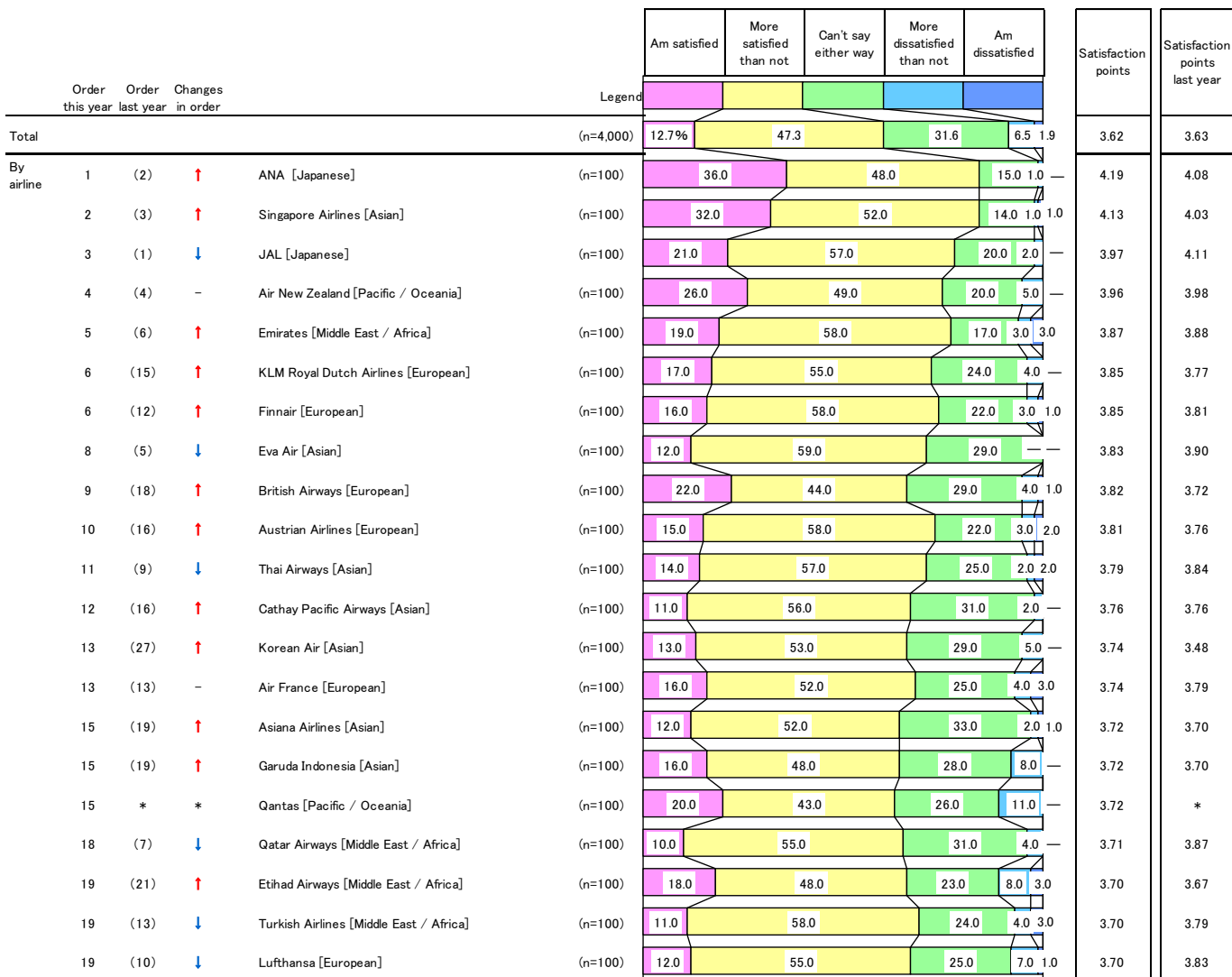


## 2. Satisfaction by Attribute

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

- The total average of satisfaction with the "service by cabin crew" was 3.62 points.
- ANA had a score of 4.19 points and went last year from 2nd place to the top spot. This was followed by Singapore Airlines (4.13 points) and Japan Airlines (3.97 points), which meant that two Japanese carriers made the TOP3.
- KLM (3.85 points) went last year from 15th place to 6th place, while Finnair (3.85 points) went last year from 12nd place to 6th place.
- 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)

		Speed of response	Courtesy of response	Accuracy of response	Announcements at time of takeoff, landing, etc.	Other	Nothing in particular
Reasons for satisfaction	2,399	22.3	56.9	24.3	16.2	1.3	20.8
Reasons for dissatisfaction	1,601	11.1	26.0	9.9	6.5	3.7	54.6

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

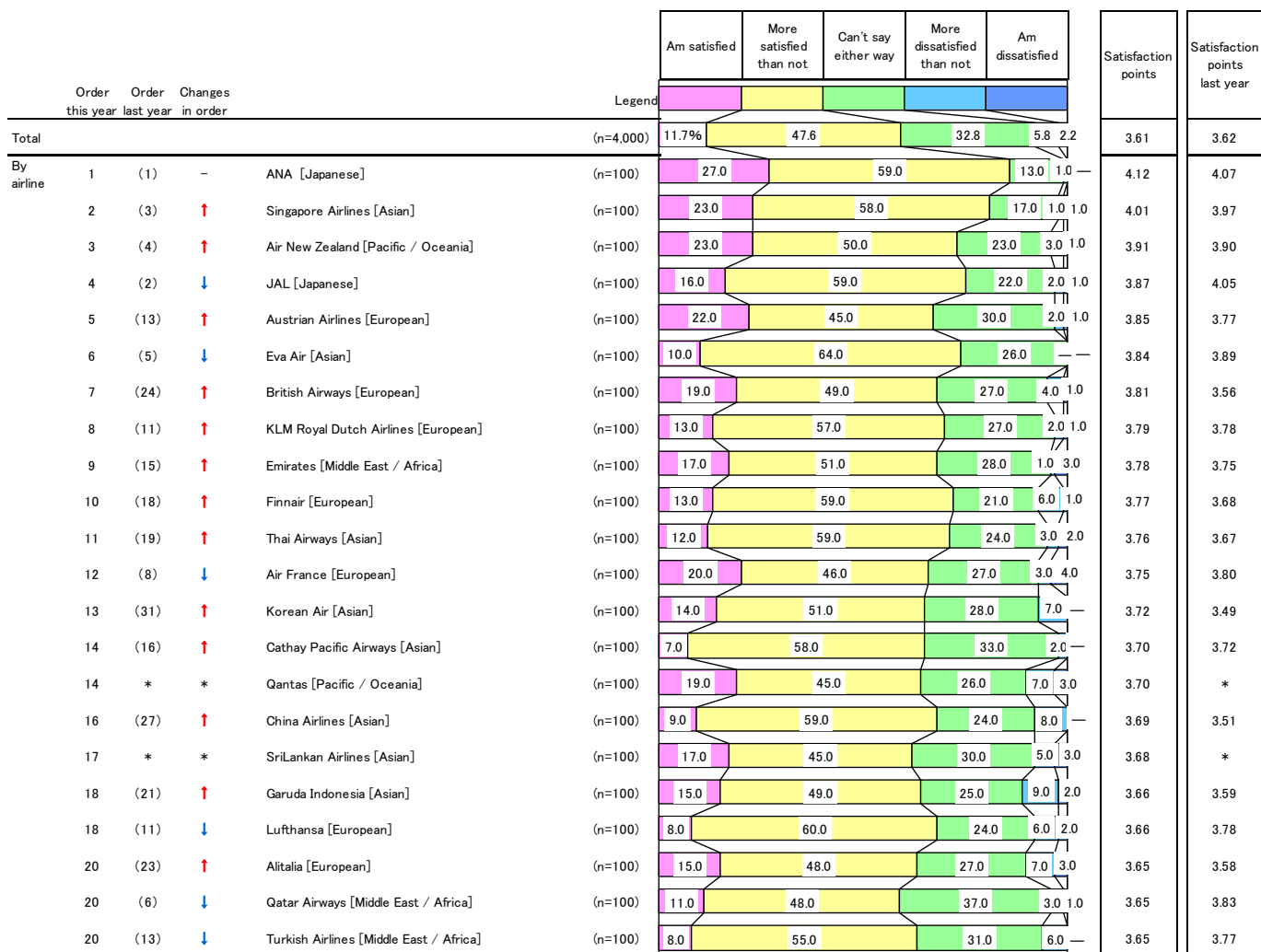
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

## 2. Satisfaction by Attribute

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

- The total average of satisfaction with the "service by ground crew" was 3.61 points.
- As was the case last year, ANA scored 4.12 points and took the top spot. This was followed by Singapore Airlines (4.01 points) and Air New Zealand (3.91 points).
- Austrian Airline scored 3.85 points and went last year from 13th place to 5th place, while British Airways had a score of 3.81 points and shot up from 24th place last year to 7th place.
- 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	2,370	63.2	29.7	16.1	6.2	1.1	23.2
Reasons for dissatisfaction	1,630	22.9	13.7	7.0	3.4	3.1	59.6

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

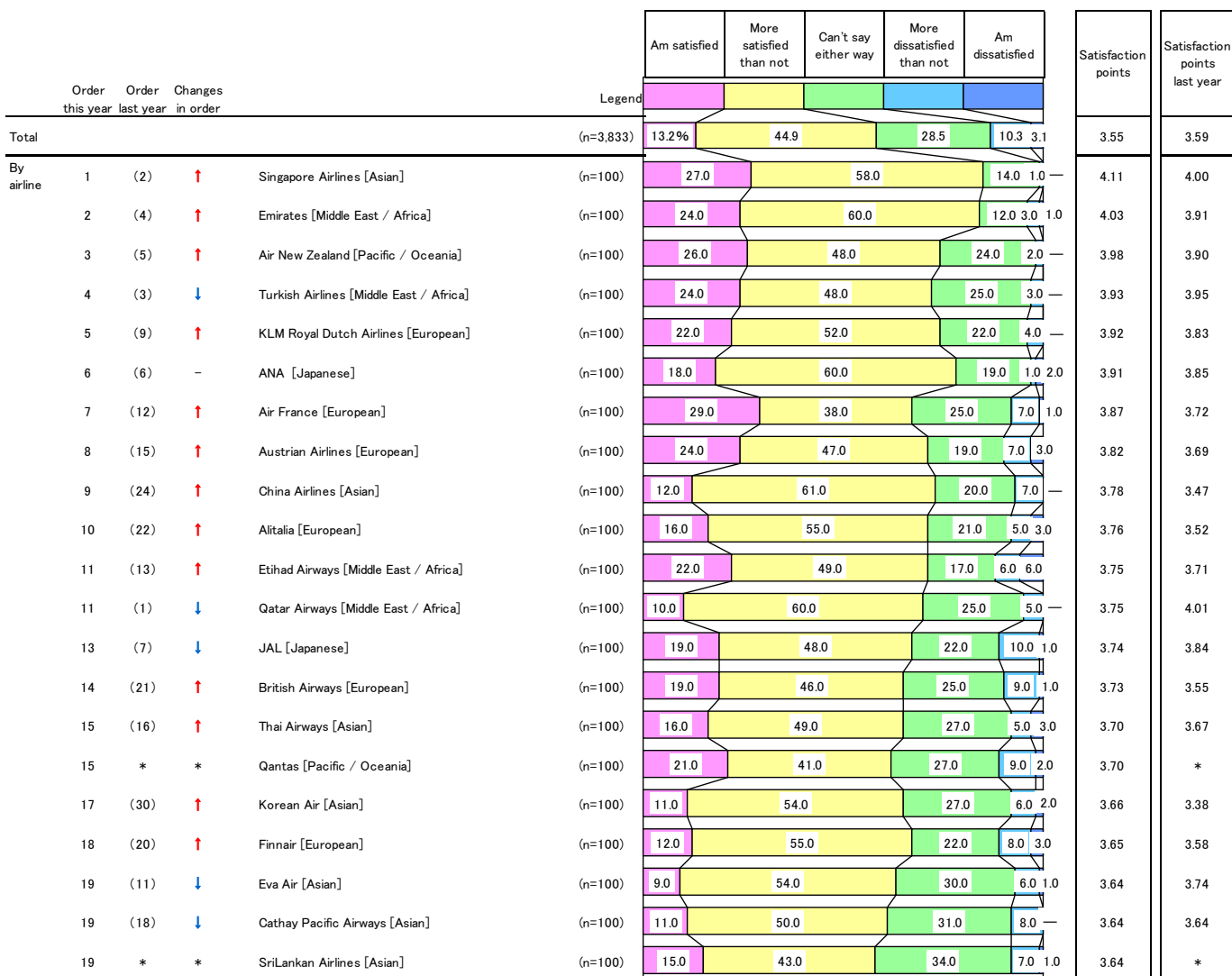
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

## 2. Satisfaction by Attribute

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

- The total average of satisfaction with "in-flight food and drink service" was 3.55 points.
- Singapore Airlines had a score of 4.11 points and went from 2nd place last year to the top spot. This was followed by Emirates (4.03 points) and Air New Zealand (3.98 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.

† Tabulated with AirAsia X, Jeju Air, Jetstar Airways, Vanilla Air, and Peach Aviation, which has less than 80s users.

#### ■ 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	2,226	63.5	42.4	27.9	31.9	32.1	33.2	0.7	6.4
Reasons for dissatisfaction	1,607	52.0	13.8	10.1	5.8	6.7	12.3	2.7	27.4

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

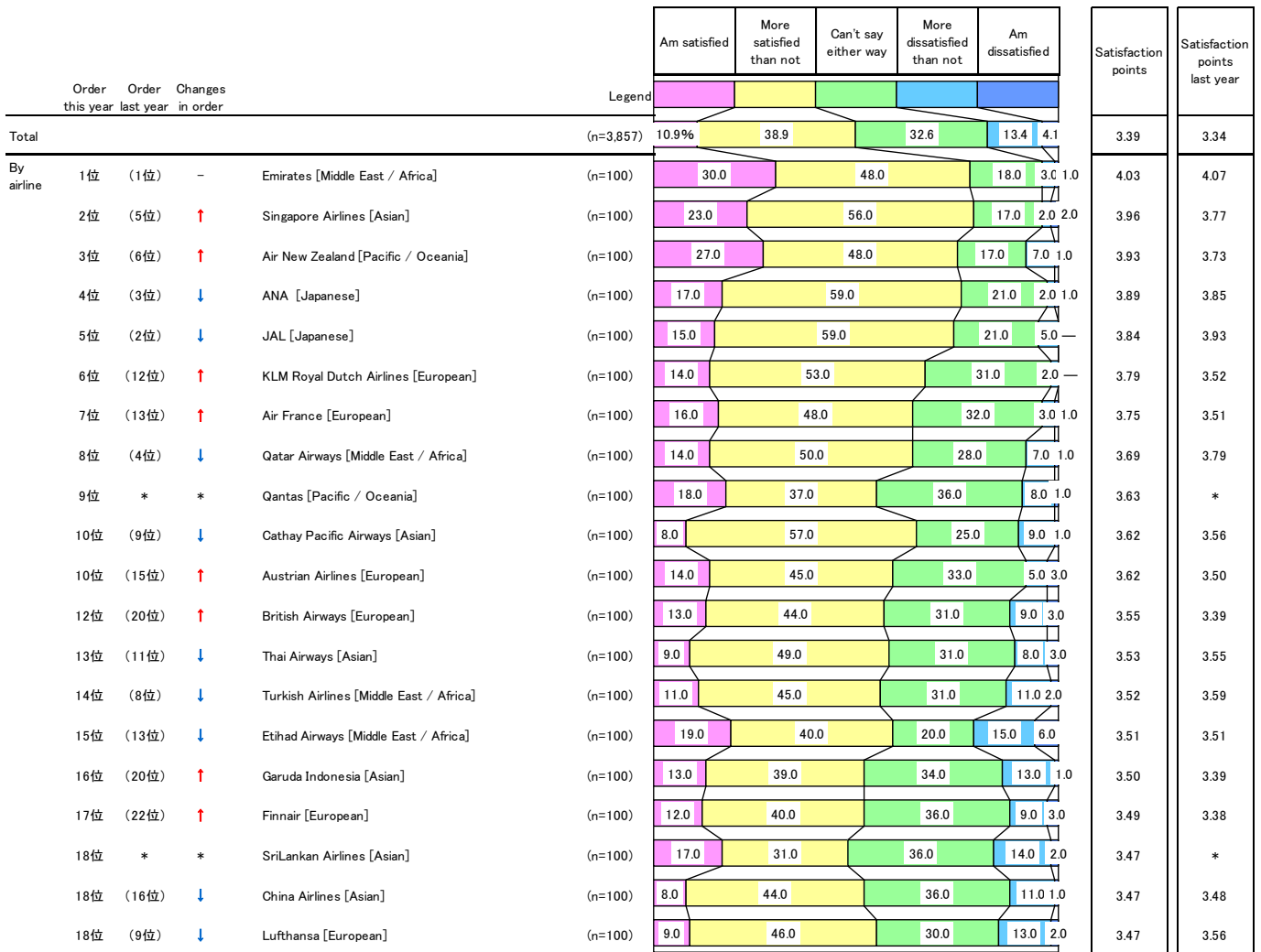
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

## 2. Satisfaction by Attribute

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

- The satisfaction score for "inflight entertainment" had an overall average of 3.39 points, which was the lowest score out of the five categories.
- Like last year, the top scorer this year was Emirates at 4.03 points. This was followed by Singapore Airlines (3.96 points) and Air New Zealand (3.93 points).
- Given by notably many as the reasons for satisfaction and reasons for dissatisfaction were "Movies / TV programs available" and "Number of TV channels and movies."

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



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

† Tabulated with AirAsia X, Jeju Air, Jetstar Airways, Vanilla Air, and Peach Aviation, which has less than 80s users.

#### ■ 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	1,924	44.6	51.5	14.6	13.6	9.2	10.5	7.8	4.5	4.7	10.1	3.2	0.3	16.1
Reasons for dissatisfaction	1,933	22.2	35.1	7.1	7.9	5.1	5.8	5.4	2.3	3.8	7.0	2.5	3.7	39.6

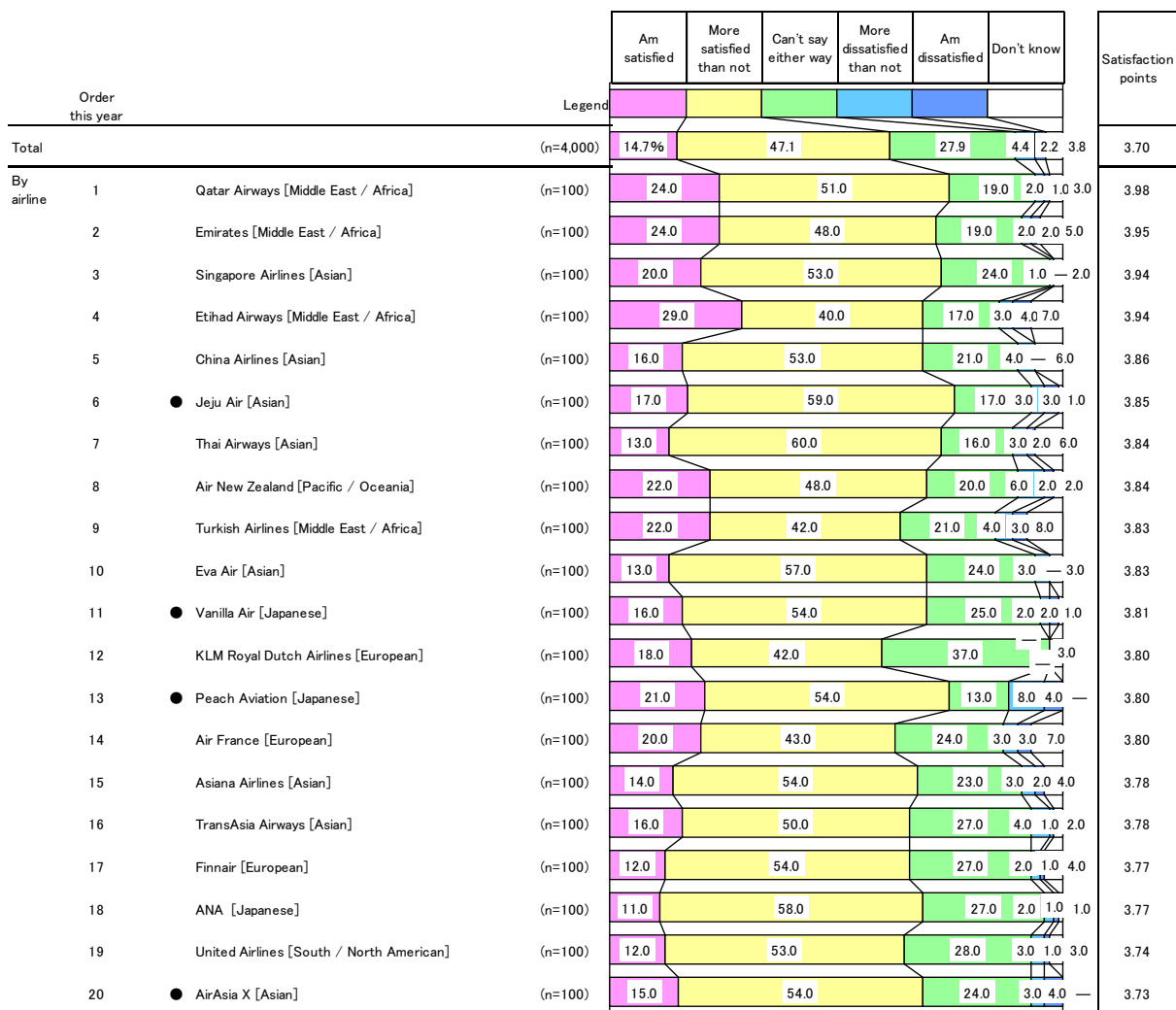
† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

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

### 3. Satisfaction with Cost Performance: TOP20

- For cost performance, the overall average of satisfaction was 3.70 points.
- The top spot was earned by Qatar Airways with 3.98 points. This was followed by Emirates (3.95 points) and Singapore Airlines (3.94 points).
- The top reasons for both satisfaction and dissatisfaction was "Price of the air fare."

#### ■ Satisfaction with cost performance (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)

#### ■ Reasons for Satisfaction / Reasons for Dissatisfaction with cost performance (Answers about satisfaction / Multiple Answer)

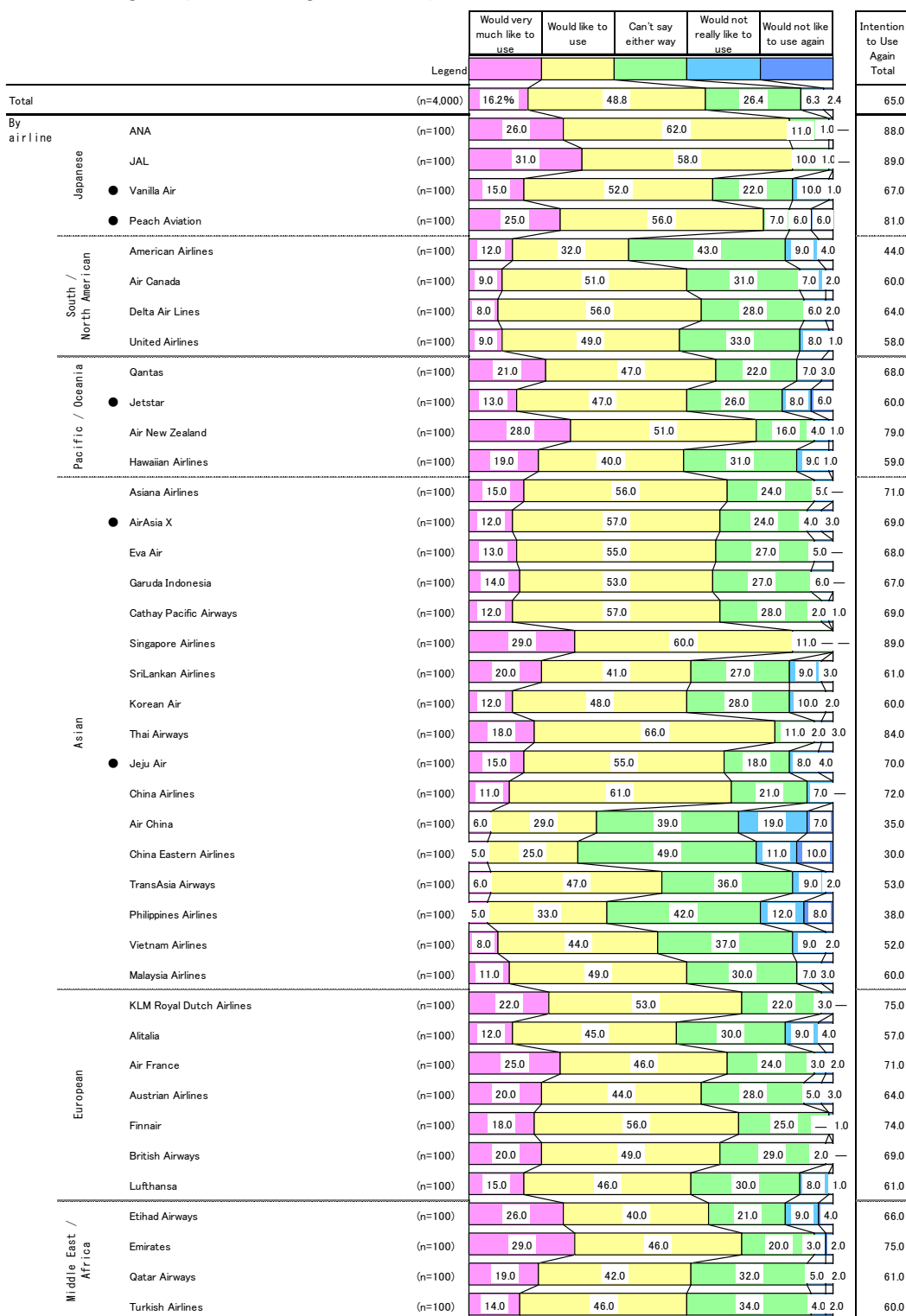
		(%)								
	Sample	Air fare ticket	Inflight food/drink and service	Service by cabin crew	Service by ground crew	Equipment on aircraft	Inflight entertainment	Safety/ reliability	Other	None of the above
Reasons for satisfaction	2,469	64.1	43.5	33.7	22.6	24.0	25.4	25.2	1.8	4.1
Reasons for dissatisfaction	1,379	33.1	27.7	17.0	12.8	16.1	22.6	8.6	5.2	26.3

† "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."

## 4. 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 65%.
- A breakdown by airline shows that for "Intention to use again - total" Japan Airlines and Singapore Airlines tied at the top spot with 89%. This was followed by ANA (88%).
- Among LCCs, the "Intention to use again - total" score for Peach Aviation was 81%, which was 5th place out of the total.

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



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

## 5. Airlines Desired for Future Use

- When respondents were asked which airline they would most like to try, ANA (54%) was the top response - same as last year. This was followed by Japan Airlines at 46%, which indicates that these two Japanese carriers maintained high usage intention rates.
- Among LCCs, Peach Aviation took 6th place with a score of 7%.

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

		2016 Survey (%)	2016 Survey (n=4,000)	2016 Survey (%)	2015 Survey Ranking (n=4,000)	2015 Survey (%)	Rate of increase
1	ANA [Japanese]	54.4	n=2,174	54.4	1	62.5	↓
2	JAL [Japanese]	45.8	n=1,833	45.8	2	49.8	↓
3	Singapore Airlines [Asian]	20.2	n=806	20.2	3	20.1	—
4	Emirates [Middle East / Africa]	16.2	n=648	16.2	4	14.8	↑
5	Lufthansa [European]	7.3	n=290	7.3	5	7.3	—
6	● Peach Aviation [Japanese]	6.7	n=268	6.7	8	4.9	↑
7	Delta Air Lines [South / North American]	6.1	n=242	6.1	7	5.3	—
8	Air France [European]	5.7	n=226	5.7	6	6.5	—
9	United Airlines [South / North American]	5.3	n=213	5.3	12	4.0	↑
	Cathay Pacific Airways [Asian]	5.3	n=213	5.3	9	4.8	—
11	● Vanilla Air [Japanese]	4.2	n=168	4.2	22	2.3	↑
12	Finnair [European]	4.0	n=161	4.0	14	3.7	—
13	Qatar Airways [Middle East / Africa]	3.9	n=156	3.9	13	3.8	—
14	Hawaiian Airlines [Pacific / Oceania]	3.7	n=146	3.7	20	2.5	↑
15	Thai Airways [Asian]	3.6	n=143	3.6	11	4.2	—
16	Air New Zealand [Pacific / Oceania]	3.5	n=138	3.5	18	2.5	↑
17	Qantas [Pacific / Oceania]	3.3	n=131	3.3	17	2.6	—
18	KLM Royal Dutch Airlines [European]	3.1	n=124	3.1	10	4.6	↓
19	Virgin Atlantic	2.8	n=110	2.8	16	3.0	—
20	Air Canada [South / North American]	2.6	n=104	2.6	19	2.5	—
	American Airlines [South / North American]	2.6	n=104	2.6	25	1.9	—
22	Etihad Airways [Middle East / Africa]	2.5	n=99	2.5	27	1.9	—
23	British Airways [European]	2.3	n=91	2.3	23	2.2	—
24	● Jetstar [Pacific / Oceania]	2.1	n=85	2.1	39	0.7	↑
25	Korean Air [Asian]	1.9	n=75	1.9	28	1.8	—
26	Swiss International Airlines	1.7	n=68	1.7	21	2.4	—
27	Alitalia [European]	1.6	n=63	1.6	30	1.7	—
28	Turkish Airlines [Middle East / Africa]	1.5	n=60	1.5	25	1.9	—
	Asiana Airlines [Asian]	1.5	n=60	1.5	32	1.4	—
30	China Airlines [Asian]	1.4	n=56	1.4	35	0.8	—
31	Malaysia Airlines [Asian]	1.2	n=46	1.2	35	0.8	—
32	Austrian Airlines [European]	1.1	n=44	1.1	31	1.4	—
33	Eva Air [Asian]	1.1	n=43	1.1	33	1.1	—
34	Vietnam Airlines [Asian]	0.9	n=35	0.9	39	0.7	—
35	● Jetstar Asia Airways	0.8	n=33	0.8	56	0.2	—
36	Garuda Indonesia [Asian]	0.8	n=31	0.8	38	0.7	—
37	Scandinavian Airlines	0.8	n=30	0.8	34	1.0	—
38	● AirAsia X [Asian]	0.7	n=29	0.7	42	0.5	—
39	● Thai AirAsia X	0.7	n=27	0.7	48	0.3	—
40	Air Tahiti Nui	0.6	n=22	0.6	37	0.7	—
41	● Jeju Air [Asian]	0.5	n=20	0.5	47	0.4	—
	Aero Mexico	0.5	n=20	0.5	45	0.4	—
43	China Eastern Airlines [Asian]	0.5	n=18	0.5	45	0.4	—
44	Air China [Asian]	0.4	n=15	0.4	50	0.3	—
45	Philippines Airlines [Asian]	0.3	n=13	0.3	42	0.5	—
	● Cebu Pacific Air	0.3	n=13	0.3	41	0.6	—
47	Tigerair Taiwan	0.3	n=12	0.3	*	*	*
	SriLankan Airlines [Asian]	0.3	n=12	0.3	57	0.1	—
	Aeroflot	0.3	n=12	0.3	48	0.3	—
50	China Southern Airlines	0.3	n=11	0.3	61	0.1	—
51	● Hong Kong Express Airways	0.3	n=10	0.3	44	0.5	—
	US Airways	0.3	n=10	0.3	50	0.3	—
53	South African Airways	0.2	n=9	0.2	61	0.1	—
54	TransAsia Airways [Asian]	0.2	n=8	0.2	75	—	—
	● Scoot	0.2	n=8	0.2	54	0.2	—
	● Air Busan	0.2	n=8	0.2	61	0.1	—
	Air Calédonie International	0.2	n=8	0.2	50	0.3	—
58	● Spring Airlines	0.2	n=6	0.2	53	0.2	—
	Air Macau	0.2	n=6	0.2	61	0.1	—
60	● Jin Air	0.1	n=5	0.1	61	0.1	—
	Ethiopian Airlines	0.1	n=5	0.1	61	0.1	—
62	Juneyao Airlines	0.1	n=4	0.1	81	—	—
	Dragonair	0.1	n=4	0.1	54	0.2	—
	Bangkok Airways	0.1	n=4	0.1	57	0.1	—
	Air Niugini	0.1	n=4	0.1	59	0.1	—
	● TWay Airlines	0.1	n=4	0.1	61	0.1	—
	Air Indian	0.1	n=4	0.1	81	—	—
	Uzbekistan Airways	0.1	n=4	0.1	81	—	—
	Asian Air	0.1	n=4	0.1	75	—	—
70	Siberia Airlines (S7 Airlines)	0.1	n=3	0.1	75	—	—
	Aurora	0.1	n=3	0.1	72	0.1	—
	EgyptAir	0.1	n=3	0.1	59	0.1	—
73	Shenzhen Air	0.1	n=2	0.1	81	—	—
	Hong Kong Airlines	0.1	n=2	0.1	61	0.1	—
	Miat Mongolian Airlines	0.1	n=2	0.1	72	0.1	—
	Pakistan International Airlines	0.1	n=2	0.1	81	—	—
	Iran Air	0.1	n=2	0.1	61	0.1	—
	● Easter Jet	0.1	n=2	0.1	61	0.1	—
79	Shandong Airlines	—	n=1	—	81	—	—
	Jet Airways	—	n=1	—	75	—	—
	Jet Asia Airways	—	n=1	—	81	—	—
82	Shanghai Airlines	—	n=0	—	75	—	—
	Asia Atlantic Airlines	—	n=0	—	81	—	—
	Other	0.5	n=21	0.5	—	—	—
	Don't know	7.6	n=305	7.6	6.3	—	—

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

† "●" 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.

† Rate of increase: The arrow indicates increases/decreases for airlines for which there were changes of plus or minus one point between the 2015 survey and 2016 survey.

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