

エィビ-ロード
AB-ROAD

2017

**Airline Satisfaction
Survey**



Part 1: Outline of This Report	3
1. Outline of the Survey	4
2. Profile of the Respondents	5
• Gender /Age / Area of Residence /Occupation /Annual income	5
• Purpose for Overseas Travel and Persons Accompanying /Overseas Travel Type / Time spent on flight (per one-way)	6
• Means of Arranging Air Tickets Used	7
• Air Tickets Used	8
• Whether Airline Website Was Used When Making Overseas Travel	9
• Reason for Using Airline Website	10
• Items of Importance When Choosing Airline	11
• Optional Services Not Free That Were Used	13
Part 2: Airline Evaluations	14
1. Overall Satisfaction	15
2. Satisfaction by Attribute	16
1) Aircraft Equipment and Amenities	16
2) Service by Cabin Crew	17
3) Service by Ground Crew	18
4) In-flight Food and Drink Service	19
5) In-flight Entertainment	20
3. Satisfaction with Cost Performance	21
4. Intention to Use Again	22
5. Airlines Desired for Future Use	23

Part 1: Outline of This Report



1. Outline of the Survey

○Objective

Get airline evaluations from those who traveled overseas in 2016.

○Respondents

The survey was done on 7,170 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 2016 (the month of departure being in 2016).

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

○Timing

Fri. 14 April through Mon. 17 April, 2017

○Research Method

Internet survey

○Tabulation Numbers

4,000 respondents (respondents contacted: 7,170, samples collected: 4,364s (successful collection rate of 60.9%))

* 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, Jetstar Asia Airways, Singapore Airlines, Tigerair Taiwan, Korean Air, Thai Airways, Jeju Air, China Airlines, Air China, China Eastern Airlines, Philippines Airlines, Vietnam Airlines, Aeroflot, Alitalia, Air France, LOT Polish Airlines, KLM Royal Dutch Airlines, Scandinavian Airlines, Finnair, British Airways, Lufthansa, 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 2016, according to the results of the “2017 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.
“2016 Airline Satisfaction Survey” - Timing: 14 April through 19 April 2016; Sample size tabulated: 4,000s (100 samples for each airline)
- (3) In this survey, respondents who in 2016 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.

"2017 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 2016 (the month of departure being in 2016).

○Timing

Tue. 21 Mar through Fri. 24 Mar, 2017

○Research Method

Internet survey

○Numbers Tabulated

4,986 respondents (respondents contacted: 7,712; samples collected:5,261 (successful collection rate of :68.2%))

○Method of Tabulation

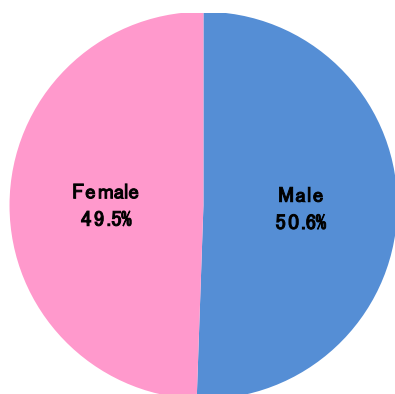
The survey results were weighted to correspond with the breakdown of leisure travelers (by gender and age).

The weightings used are as follows.

	18-29 yrs	30-39 yrs	40-49 yrs	50-59 yrs	60 yrs+
Male	1.1096529	0.8823527	0.8313084	0.7473727	1.0584185
Female	1.0878768	1.1190887	1.1520074	1.1679951	1.1523954

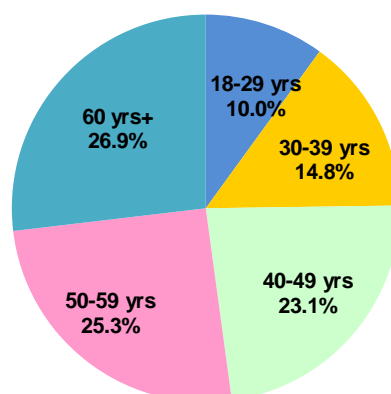
2. Profile of the Respondents

■ 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	2.7	2.9	50.1	3.1	47.0	3.2	10.7	20.9	17.8	3.1	3.2	1.6	4.9

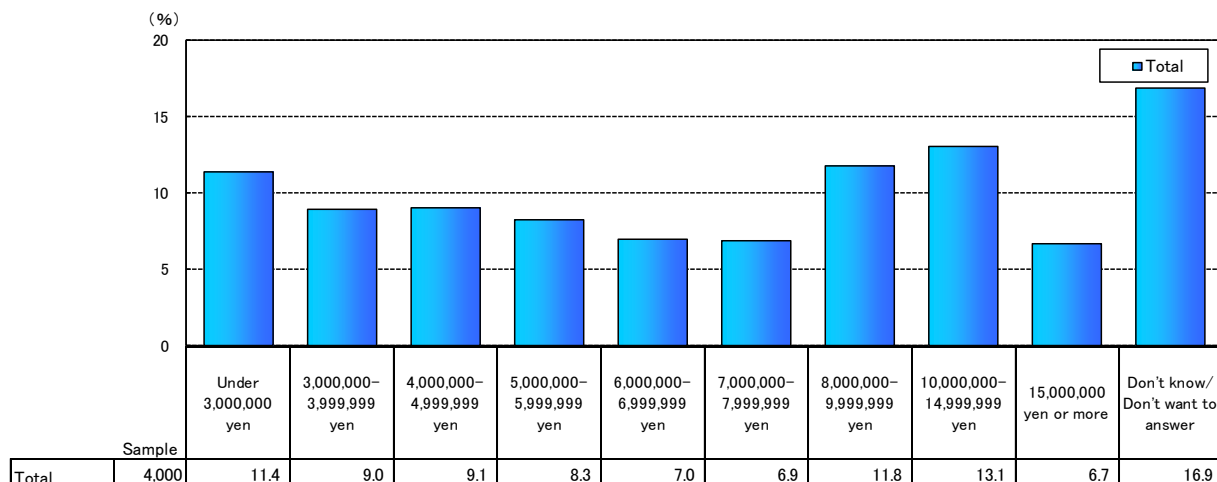
(%)

■ 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	15.1	7.8	4.2	4.3	12.3	5.0	6.3	3.0	4.2	8.7	2.6	14.3	11.3	1.2

(%)

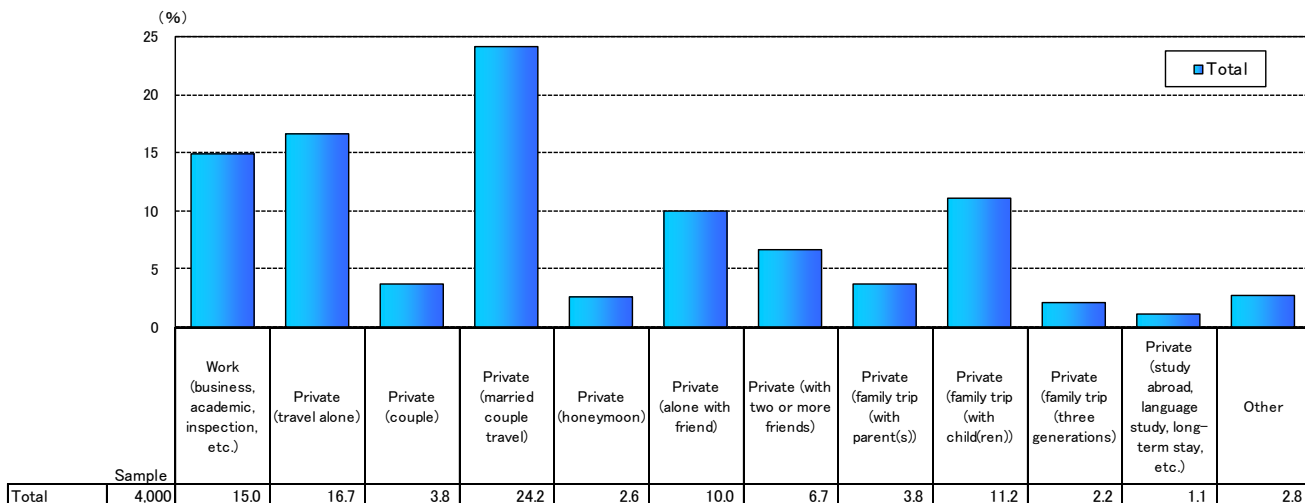
■ Annual Household Income (Total / Single Answer)



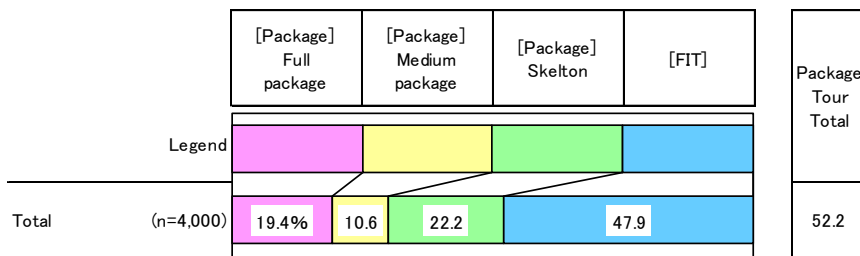
(%)

	Sample	Under 3,000,000 yen	3,000,000-3,999,999 yen	4,000,000-4,999,999 yen	5,000,000-5,999,999 yen	6,000,000-6,999,999 yen	7,000,000-7,999,999 yen	8,000,000-9,999,999 yen	10,000,000-14,999,999 yen	15,000,000 yen or more	Don't know/ Don't want to answer
Total	4,000	11.4	9.0	9.1	8.3	7.0	6.9	11.8	13.1	6.7	16.9

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

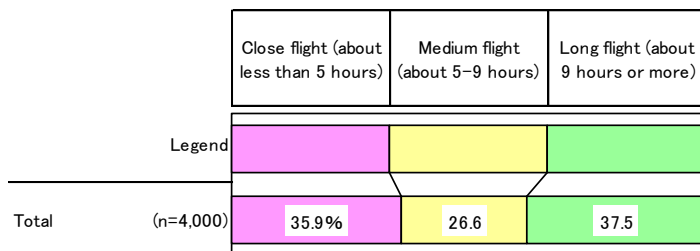


■ Overseas Travel Type (Total / Single Answer)

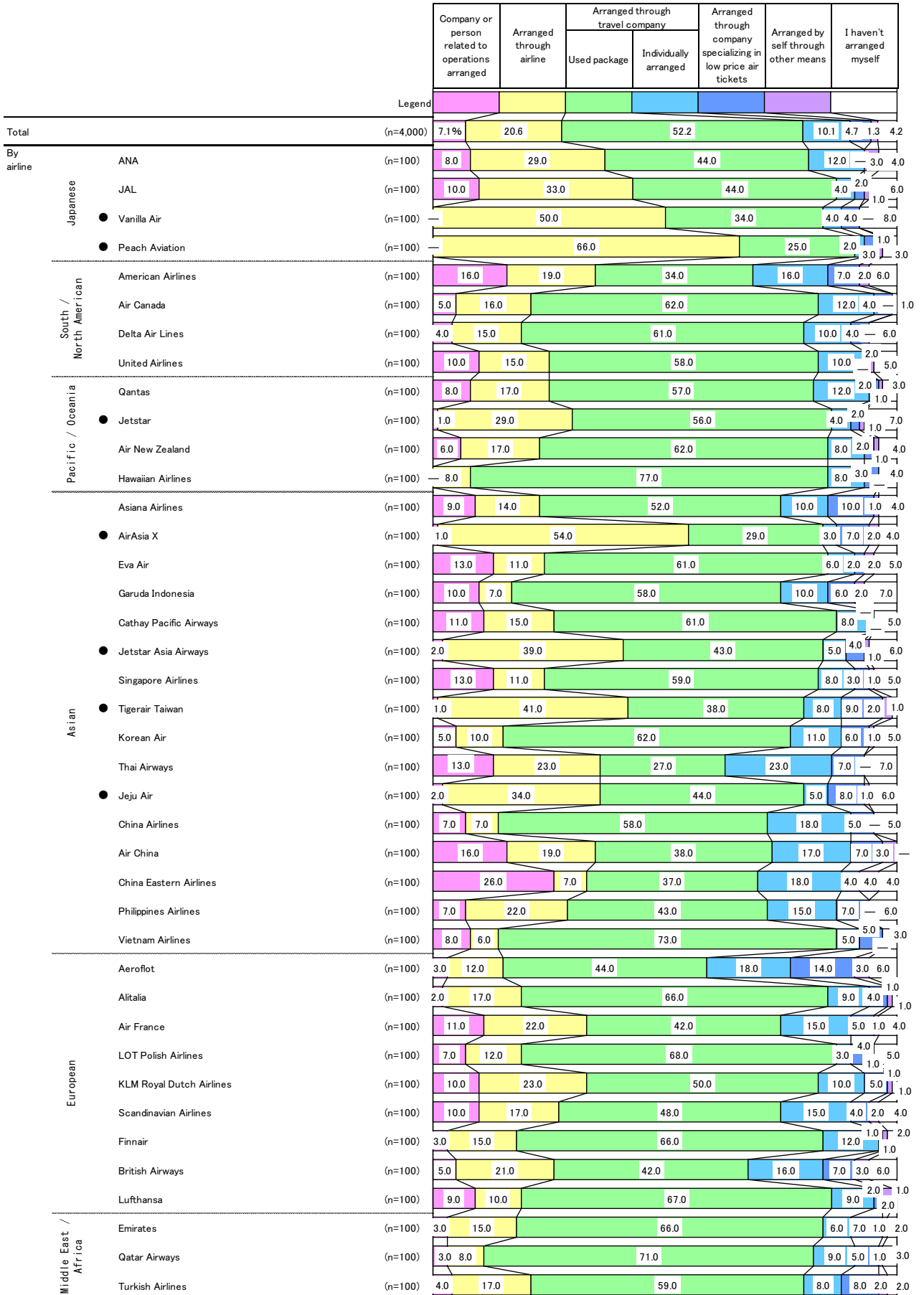


- † [Package] Full package : Tour that is scheduled with sightseeing, activities, and most meals
- [Package] Medium package : Tour that is scheduled with some sightseeing, activities, and meals, as well as tours with some free time
- [Package] Skelton : Tour that basically has free time at destinations,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

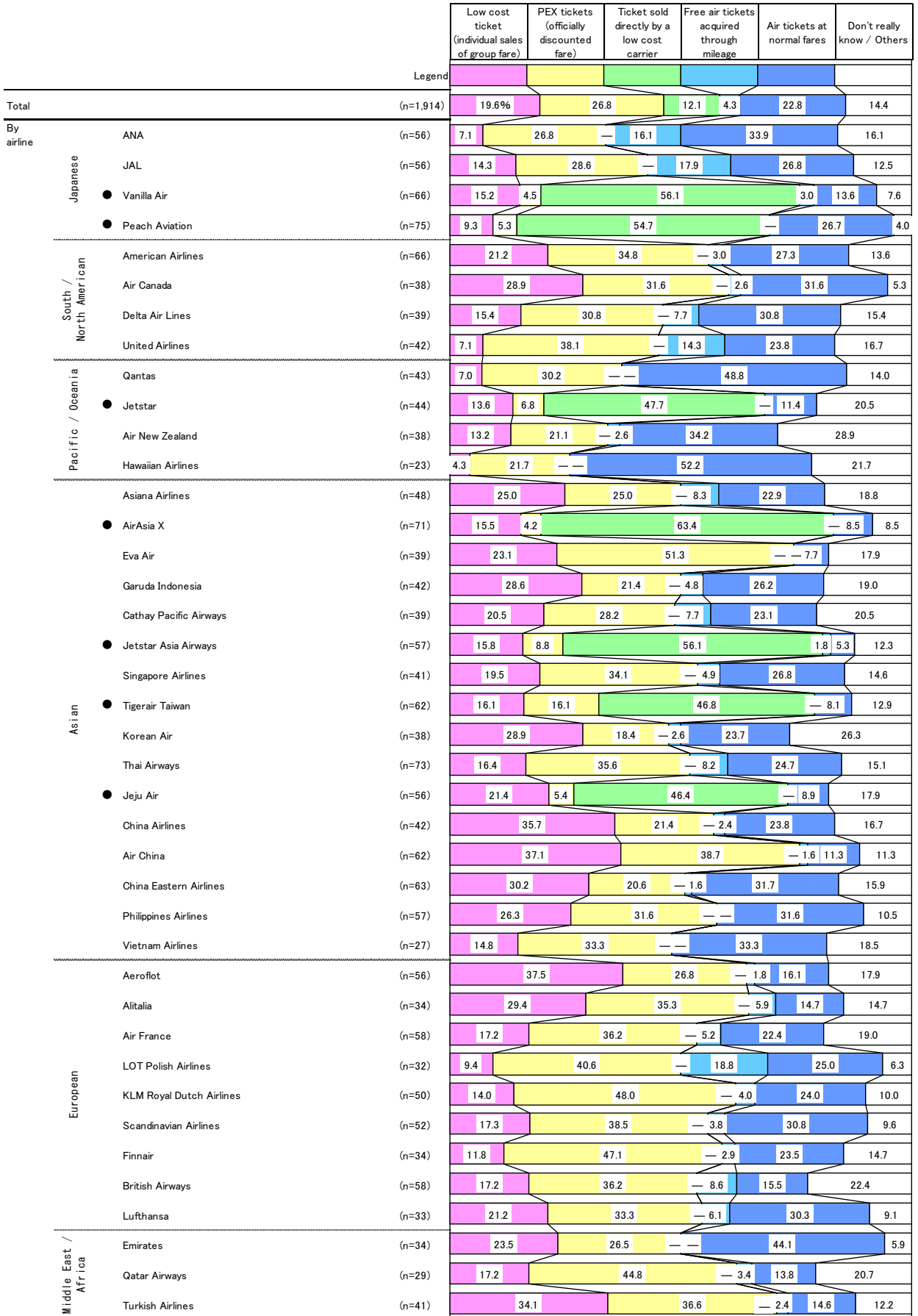


Means of Arranging Air Tickets Used (Total / Single Answer)



† "●" 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

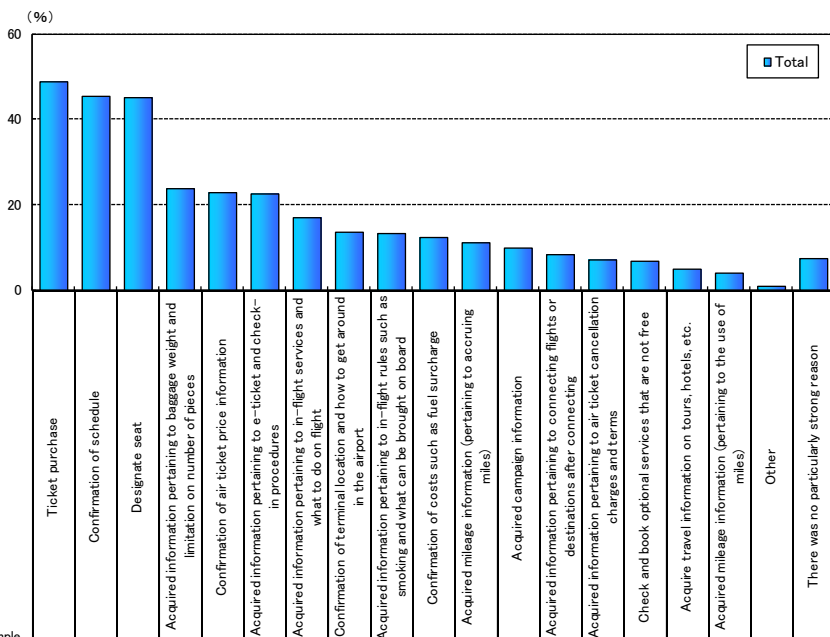
Whether Airline Website Was Used When Making Overseas Travel (Total / Single Answer)

		Legend		Period used		
		Used	Didn't use	Prior to booking	At time of booking	After booking
Total	(n=4,000)	56.2%	43.9	49.5	43.0	45.4
By airline						
● Peach Aviation [Japanese]	(n=100)	92.0	8.0	91.0	90.0	76.0
● Vanilla Air [Japanese]	(n=100)	83.0	17.0	75.0	77.0	72.0
● Jetstar Asia Airways [Asian]	(n=100)	82.0	18.0	76.0	78.0	76.0
● AirAsia X [Asian]	(n=100)	81.0	19.0	76.0	74.0	72.0
● Tigerair Taiwan [Asian]	(n=100)	75.0	25.0	71.0	66.0	54.0
ANA [Japanese]	(n=100)	71.0	29.0	67.0	59.0	60.0
JAL [Japanese]	(n=100)	69.0	31.0	61.0	58.0	59.0
● Jeju Air [Asian]	(n=100)	69.0	31.0	67.0	57.0	52.0
LOT Polish Airlines [European]	(n=100)	66.0	34.0	60.0	53.0	58.0
Air France [European]	(n=100)	65.0	35.0	56.0	43.0	53.0
Qatar Airways [Middle East / Africa]	(n=100)	64.0	36.0	50.0	37.0	47.0
● Jetstar [Pacific / Oceania]	(n=100)	60.0	40.0	55.0	54.0	52.0
American Airlines [South / North American]	(n=100)	59.0	41.0	52.0	45.0	54.0
Aeroflot [European]	(n=100)	58.0	42.0	49.0	38.0	47.0
Thai Airways [Asian]	(n=100)	57.0	43.0	54.0	42.0	50.0
United Airlines [South / North American]	(n=100)	56.0	44.0	45.0	42.0	40.0
KLM Royal Dutch Airlines [European]	(n=100)	56.0	44.0	50.0	39.0	46.0
Asiana Airlines [Asian]	(n=100)	56.0	44.0	52.0	48.0	39.0
Emirates [Middle East / Africa]	(n=100)	55.0	45.0	45.0	41.0	46.0
Qantas [Pacific / Oceania]	(n=100)	54.0	46.0	49.0	39.0	43.0
Delta Air Lines [South / North American]	(n=100)	53.0	47.0	44.0	41.0	41.0
British Airways [European]	(n=100)	53.0	47.0	46.0	36.0	46.0
Singapore Airlines [Asian]	(n=100)	53.0	47.0	44.0	37.0	43.0
Scandinavian Airlines [European]	(n=100)	51.0	49.0	45.0	36.0	44.0
Hawaiian Airlines [Pacific / Oceania]	(n=100)	51.0	49.0	43.0	36.0	37.0
Philippines Airlines [Asian]	(n=100)	51.0	49.0	47.0	39.0	40.0
Cathay Pacific Airways [Asian]	(n=100)	49.0	51.0	41.0	36.0	32.0
Lufthansa [European]	(n=100)	48.0	52.0	39.0	29.0	40.0
Air China [Asian]	(n=100)	48.0	52.0	43.0	39.0	37.0
Alitalia [European]	(n=100)	47.0	53.0	40.0	27.0	34.0
Air New Zealand [Pacific / Oceania]	(n=100)	47.0	53.0	39.0	32.0	39.0
Turkish Airlines [Middle East / Africa]	(n=100)	46.0	54.0	42.0	35.0	40.0
Garuda Indonesia [Asian]	(n=100)	46.0	54.0	42.0	33.0	35.0
Air Canada [South / North American]	(n=100)	45.0	55.0	38.0	28.0	32.0
Finnair [European]	(n=100)	45.0	55.0	37.0	30.0	37.0
Vietnam Airlines [Asian]	(n=100)	42.0	58.0	32.0	28.0	33.0
China Airlines [Asian]	(n=100)	41.0	59.0	35.0	30.0	33.0
Eva Air [Asian]	(n=100)	40.0	60.0	33.0	26.0	32.0
China Eastern Airlines [Asian]	(n=100)	32.0	68.0	25.0	21.0	25.0
Korean Air [Asian]	(n=100)	30.0	70.0	22.0	19.0	21.0

† 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)

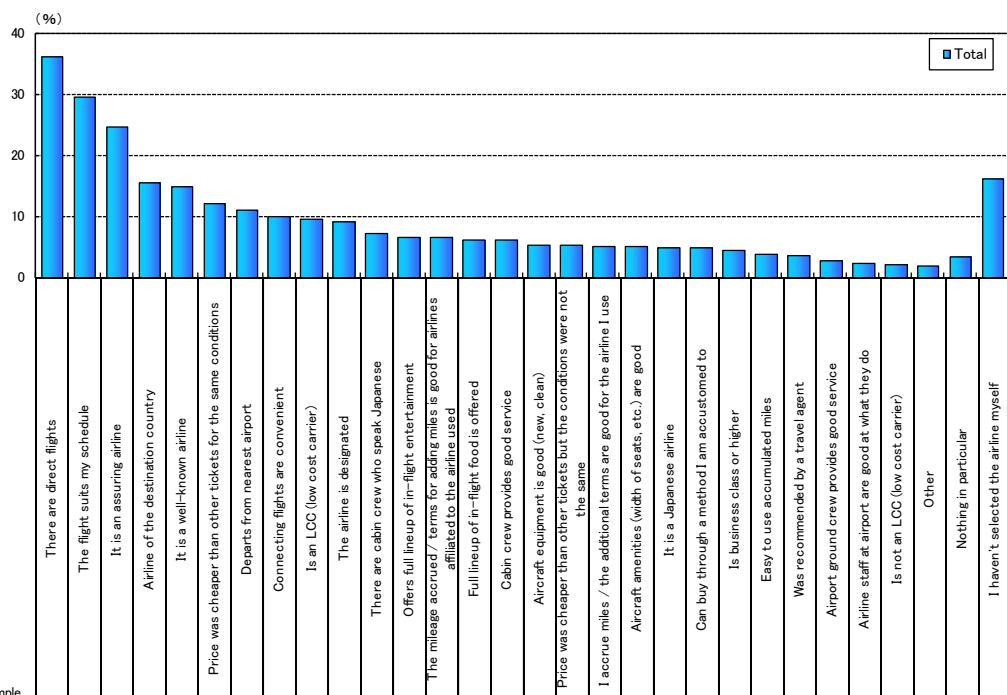
Reason for Using Airline Website (Airline website user / Multiple Answer)



Total		Sample	48.9	45.4	45.2	23.9	23.1	22.8	17.2	13.8	13.4	12.6	11.4	10.1	8.4	7.3	6.9	5.2	4.0	1.2	7.6	
By airline		(n=2,246)																				
	ANA [Japanese]	(n=71)	53.5	47.9	62.0	19.7	15.5	22.5	16.9	9.9	14.1	11.3	14.1	8.5	2.8	5.6	5.6	2.8	9.9	1.4	5.6	
	JAL [Japanese]	(n=69)	58.0	49.3	68.1	13.0	26.1	24.6	15.9	7.2	8.7	17.4	14.5	8.7	7.2	8.7	4.3	10.1	10.1	1.4	2.9	
	● Vanilla Air [Japanese]	(n=83)	73.5	57.8	42.2	32.5	31.3	22.9	8.4	16.9	22.9	12.0	2.4	20.5	1.2	7.2	13.3	6.0	—	1.2	4.8	
	● Peach Aviation [Japanese]	(n=92)	83.7	44.6	38.0	22.8	34.8	16.3	3.3	7.6	8.7	8.7	—	12.0	—	8.7	14.1	2.2	1.1	—	3.3	
	American Airlines [South / North American]	(n=59)	49.2	50.8	59.3	13.6	22.0	25.4	10.2	11.9	5.1	13.6	11.9	5.1	13.6	6.8	1.7	3.4	6.8	—	6.8	
	Air Canada [South / North American]	(n=45)	37.8	42.2	37.8	31.1	26.7	28.9	22.2	15.6	24.4	13.3	13.3	11.1	15.6	17.8	6.7	—	4.4	2.2	15.6	
	Delta Air Lines [South / North American]	(n=53)	30.2	49.1	58.5	20.8	13.2	13.2	11.3	5.7	17.0	7.5	15.1	—	1.9	5.7	1.9	7.5	1.9	1.9	3.8	
	United Airlines [South / North American]	(n=56)	32.1	39.3	48.2	16.1	10.7	17.9	14.3	8.9	8.9	8.9	16.1	3.6	1.8	7.1	1.8	—	3.6	—	10.7	
	Qantas [Pacific / Oceania]	(n=54)	51.9	59.3	53.7	29.6	22.2	27.8	27.8	18.5	18.5	14.8	16.7	11.1	13.0	7.4	7.4	5.6	7.4	1.9	1.9	
	● Jetstar [Pacific / Oceania]	(n=60)	70.0	50.0	41.7	38.3	38.3	31.7	21.7	18.3	25.0	25.0	8.3	28.3	11.7	20.0	23.3	10.0	3.3	—	5.0	
	Air New Zealand [Pacific / Oceania]	(n=47)	36.2	46.8	36.2	23.4	21.3	25.5	21.3	19.1	8.5	17.0	19.1	12.8	14.9	8.5	8.5	12.8	4.3	—	12.8	
	Hawaiian Airlines [Pacific / Oceania]	(n=51)	29.4	27.5	37.3	13.7	11.8	23.5	29.4	3.9	3.9	3.9	17.6	2.0	2.0	2.0	—	3.9	2.0	—	17.6	
	Asiana Airlines [Asian]	(n=56)	48.2	30.4	25.0	10.7	16.1	12.5	10.7	8.9	7.1	10.7	3.6	3.6	1.8	3.6	3.6	3.6	3.6	—	17.9	
	● AirAsia X [Asian]	(n=81)	81.5	54.3	45.7	44.4	37.0	33.3	13.6	14.8	13.6	12.3	2.5	19.8	7.4	8.6	22.2	2.5	1.2	—	3.7	
	Eva Air [Asian]	(n=40)	35.0	32.5	35.0	20.0	7.5	22.5	15.0	17.5	10.0	7.5	5.0	2.5	7.5	7.5	2.5	5.0	—	2.5	10.0	
	Garuda Indonesia [Asian]	(n=46)	30.4	47.8	39.1	28.3	17.4	26.1	21.7	10.9	13.0	6.5	13.0	10.9	2.2	4.3	2.2	4.3	—	—	13.0	
	Cathay Pacific Airways [Asian]	(n=49)	44.9	44.9	44.9	14.3	20.4	18.4	14.3	12.2	12.2	12.2	12.2	14.3	8.2	10.2	2.0	6.1	2.0	2.0	8.2	
	● Jetstar Asia Airways [Asian]	(n=82)	75.6	48.8	45.1	29.3	37.8	30.5	14.6	14.6	14.6	19.5	4.9	22.0	4.9	12.2	15.9	13.4	4.9	—	3.7	
	Singapore Airlines [Asian]	(n=53)	35.8	41.5	60.4	7.5	15.1	17.0	22.6	11.3	9.4	9.4	3.8	9.4	5.7	—	1.9	9.4	—	—	7.5	
	● Tigerair Taiwan [Asian]	(n=75)	70.7	49.3	38.7	34.7	28.0	22.7	9.3	18.7	20.0	16.0	1.3	9.3	1.3	5.3	14.7	5.3	1.3	—	6.7	
	Korean Air [Asian]	(n=30)	30.0	53.3	50.0	20.0	23.3	13.3	16.7	20.0	6.7	13.3	10.0	—	13.3	6.7	—	6.7	3.3	—	16.7	
	Thai Airways [Asian]	(n=57)	38.6	40.4	52.6	22.8	26.3	19.3	8.8	7.0	12.3	15.8	3.5	7.0	5.3	3.5	—	1.8	1.8	1.8	8.8	
	● Jeju Air [Asian]	(n=69)	66.7	36.2	20.3	23.2	21.7	15.9	2.9	1.4	7.2	10.1	1.4	17.4	—	4.3	4.3	2.9	1.4	—	10.1	
	China Airlines [Asian]	(n=41)	29.3	26.8	41.5	19.5	9.8	22.0	14.6	7.3	2.4	9.8	9.8	4.9	—	2.4	—	7.3	2.4	—	12.2	
	Air China [Asian]	(n=48)	58.3	47.9	43.8	20.8	39.6	22.9	6.3	4.2	10.4	20.8	8.3	4.2	2.1	6.3	4.2	6.3	6.3	—	10.4	
	China Eastern Airlines [Asian]	(n=32)	43.8	34.4	31.3	15.6	15.6	6.3	3.1	3.1	6.3	6.3	9.4	9.4	3.1	—	—	3.1	3.1	3.1	12.5	
	Philippines Airlines [Asian]	(n=51)	62.7	41.2	29.4	9.8	13.7	9.8	9.8	9.8	3.9	5.9	7.8	3.9	3.9	—	2.0	2.0	—	3.9	13.7	
	Vietnam Airlines [Asian]	(n=42)	21.4	26.2	33.3	21.4	9.5	21.4	23.8	14.3	7.1	—	4.8	11.9	9.5	—	—	9.5	—	4.8	7.1	
	Aeroflot [European]	(n=58)	31.0	43.1	44.8	29.3	24.1	24.1	24.1	12.1	17.2	6.9	19.0	3.4	15.5	5.2	3.4	3.4	8.6	6.9	8.6	
	Alitalia [European]	(n=47)	34.0	46.8	46.8	29.8	17.0	23.4	21.3	19.1	23.4	8.5	17.0	6.4	8.5	8.5	2.1	4.3	2.1	2.1	8.5	
	Air France [European]	(n=65)	44.6	50.8	55.4	16.9	23.1	21.5	23.1	18.5	15.4	15.4	16.9	6.2	9.2	7.7	9.2	4.6	4.6	—	4.6	
	LOT Polish Airlines [European]	(n=66)	47.0	45.5	40.9	47.0	28.8	37.9	34.8	37.9	34.8	25.8	27.3	19.7	24.2	24.2	15.2	19.7	16.7	1.5	3.0	
	KLM Royal Dutch Airlines [European]	(n=56)	42.9	51.8	55.4	14.3	28.6	25.0	16.1	10.7	12.5	16.1	17.9	5.4	16.1	7.1	8.9	1.8	10.7	—	1.8	
	Scandinavian Airlines [European]	(n=51)	52.9	54.9	52.9	49.0	31.4	43.1	37.3	27.5	31.4	33.3	27.5	13.7	25.5	15.7	9.8	3.9	9.8	2.0	2.0	
	Finnair [European]	(n=45)	33.3	48.9	51.1	17.8	24.4	20.0	22.2	22.2	4.4	13.3	15.6	6.7	17.8	4.4	4.4	—	2.2	6.7	8.9	
	British Airways [European]	(n=53)	41.5	54.7	52.8	26.4	22.6	28.3	26.4	18.9	22.6	13.2	17.0	13.2	20.8	13.2	5.7	1.9	5.7	1.9	1.9	
	Lufthansa [European]	(n=48)	27.1	39.6	39.6	16.7	12.5	18.8	20.8	12.5	6.3	2.1	12.5	—	12.5	4.2	—	2.1	—	—	8.3	
	Emirates [Middle East / Africa]	(n=55)	41.8	45.5	54.5	12.7	20.0	23.6	20.0	12.7	3.6	9.1	20.0	7.3	5.5	1.8	3.6	—	1.8	—	7.3	
	Qatar Airways [Middle East / Africa]	(n=64)	25.0	34.4	43.8	20.3	17.2	17.2	23.4	15.6	10.9	7.8	18.8	9.4	12.5	4.7	4.7	7.8	3.1	3.1	7.8	
	Turkish Airlines [Middle East / Africa]	(n=46)	37.0	56.5	39.1	32.6	17.4	19.6	28.3	23.9	13.0	6.5	15.2	8.7	21.7	2.2	4.3	—	2.2	2.2	13.0	

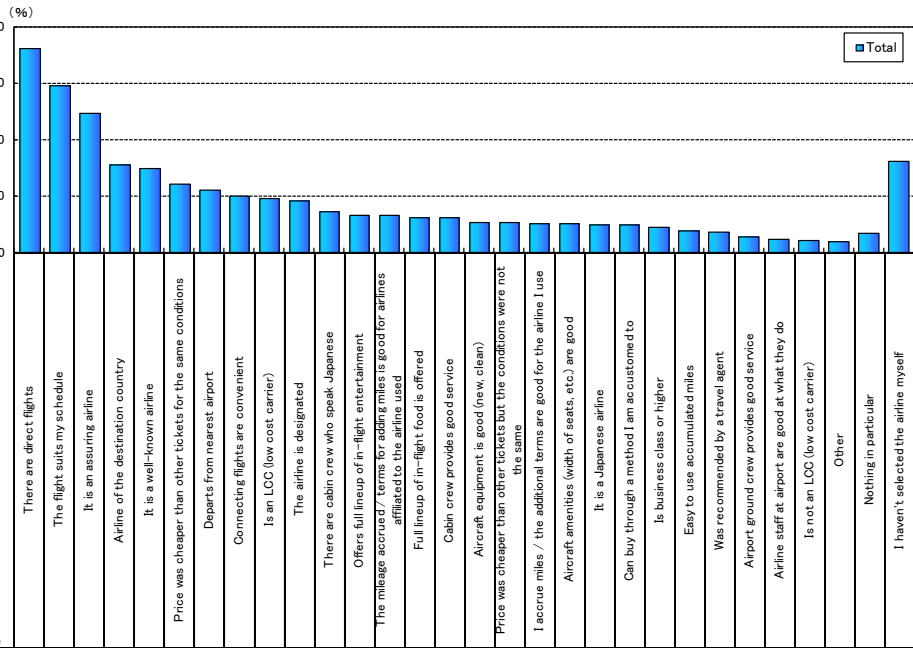
† "●" indicates a low-cost carrier (LCC)

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



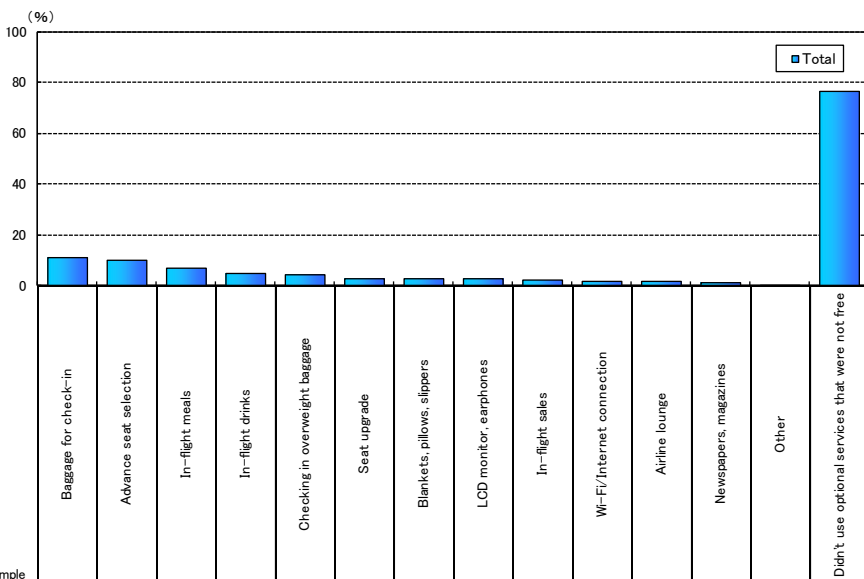
Sample		Total																													
Total (n=4,000)		36.2	29.6	24.6	15.6	15.0	12.1	11.1	10.0	9.5	9.2	7.3	6.7	6.5	6.1	6.1	5.3	5.3	5.2	5.1	5.0	4.9	4.5	3.9	3.6	2.8	2.4	2.1	2.0	3.4	16.1
Gender	Male (n=2,022)	35.3	27.3	25.1	17.3	16.1	12.1	10.5	10.1	10.1	8.7	7.5	6.5	7.3	6.1	6.4	5.9	5.8	5.7	5.9	5.9	5.0	4.8	4.6	3.7	3.0	2.8	2.3	1.4	3.9	15.1
	Female (n=1,978)	37.0	31.9	24.1	13.9	13.8	12.1	11.6	9.9	8.9	9.8	7.0	6.9	5.6	6.1	5.8	4.6	4.8	4.7	4.3	4.1	4.8	4.0	3.2	3.5	2.6	2.0	1.8	2.7	2.8	17.2
Age	18-29 yrs (n=400)	31.0	27.8	25.5	7.5	15.3	13.0	9.5	7.0	11.3	6.0	7.0	5.5	2.8	3.3	3.8	3.0	5.3	1.3	3.3	4.8	4.3	1.5	2.3	3.3	2.5	2.3	2.0	1.0	4.3	22.3
	30-39 yrs (n=591)	39.8	35.5	26.2	10.3	14.6	15.4	13.7	10.0	12.4	5.9	7.4	6.6	5.1	5.1	4.7	4.2	4.9	4.6	3.4	4.9	5.2	2.0	3.7	4.2	2.9	2.0	2.2	2.5	3.2	12.9
	40-49 yrs (n=922)	37.0	34.2	25.7	15.5	14.4	15.9	11.6	10.6	11.3	5.4	6.2	7.7	6.6	6.8	6.6	5.3	5.1	6.9	5.3	5.4	4.1	3.3	5.2	2.5	3.0	2.5	2.0	1.8	4.0	11.7
	50-59 yrs (n=1,011)	37.3	31.8	25.7	17.8	15.6	10.9	9.9	11.7	8.7	8.5	7.1	6.7	7.1	6.8	6.4	6.6	6.5	6.6	6.6	5.4	5.1	6.0	5.1	3.0	2.7	2.1	1.9	2.0	2.9	14.5
	60 yrs or older (n=1,076)	34.3	21.0	21.4	19.5	14.9	7.7	10.8	9.1	6.5	16.2	8.3	6.2	7.8	6.4	7.0	5.3	4.6	4.2	5.1	4.4	5.3	6.4	2.4	4.8	2.7	3.0	2.3	2.3	3.1	20.9
Area of residence	Kanto (n=2,005)	37.8	30.0	24.5	15.9	15.1	12.8	10.0	10.0	8.2	10.0	6.8	6.9	7.6	6.7	6.4	6.1	6.0	6.0	6.8	5.7	4.9	5.6	4.5	3.4	2.9	2.6	2.2	2.0	2.9	16.1
	Kansai (n=835)	32.7	31.5	27.7	14.1	15.1	11.6	12.7	9.3	12.5	9.6	6.5	7.7	5.6	5.9	6.2	4.8	5.0	4.3	3.8	5.3	4.7	3.5	2.6	3.1	2.3	2.4	2.0	2.8	4.2	15.6
	Tokai (n=428)	32.2	29.4	22.2	15.9	12.1	12.4	13.8	13.3	6.5	8.6	7.5	5.4	4.9	4.4	4.0	3.3	4.4	3.0	2.3	2.1	3.0	3.3	3.7	2.8	1.2	0.7	1.2	1.2	4.0	15.4
Travel type	Package (n=2,086)	30.4	21.0	24.1	14.3	15.9	6.2	9.0	5.8	5.2	15.5	8.6	7.4	4.5	6.3	6.4	4.6	2.3	3.4	4.6	4.4	2.3	4.5	2.6	5.6	2.9	2.7	2.1	1.3	3.4	24.9
	Full package (n=774)	21.8	9.3	22.2	12.3	12.0	1.6	5.8	4.1	2.1	19.9	8.0	7.2	5.0	5.9	5.6	4.1	0.5	2.8	4.4	3.0	1.6	4.8	2.5	5.9	3.2	3.0	2.1	1.3	3.5	37.3
	Medium package (n=424)	29.5	22.2	25.2	12.7	19.3	3.5	7.5	5.9	5.4	17.2	8.5	6.8	3.8	5.9	7.5	4.0	2.1	2.8	3.3	5.2	1.4	4.5	2.1	6.8	2.4	2.8	2.6	1.7	2.1	27.6
	Skelton (n=888)	38.4	30.6	25.1	16.8	17.7	11.5	12.4	7.3	7.8	10.9	9.1	7.8	4.3	6.9	6.5	5.3	4.1	4.2	5.4	5.2	3.3	4.2	2.9	4.7	2.9	2.5	1.8	1.1	3.9	12.7
FIT (n=1,914)	42.4	38.9	25.2	17.0	13.9	18.5	13.3	14.6	14.2	2.4	5.8	5.9	8.6	5.9	5.8	6.0	8.5	7.2	5.6	5.7	7.7	4.4	5.4	1.4	2.6	2.1	2.1	2.8	3.3	6.6	
Accompanying traveler	Travel alone (n=669)	38.0	33.9	25.3	16.6	13.9	19.1	12.7	13.5	17.3	6.1	6.0	6.9	10.0	6.7	6.0	6.3	9.6	6.9	5.8	5.7	9.7	4.2	6.1	1.5	2.5	3.3	2.4	2.1	3.6	7.5
	With spouse/partner/on honeymoon (n=1,222)	34.1	25.0	25.7	16.9	16.5	8.5	10.7	10.0	6.5	12.5	8.3	7.2	6.0	6.6	7.5	6.4	4.5	4.7	6.3	4.9	4.6	6.7	4.8	4.7	3.4	2.9	2.2	1.7	3.0	19.6
	With friend (n=666)	35.3	29.1	22.2	11.0	13.8	13.7	12.3	7.4	14.4	10.2	8.9	6.5	4.5	6.0	5.3	4.5	4.7	4.4	3.9	6.8	4.4	2.1	2.3	3.3	3.2	2.3	2.6	2.7	2.9	18.9
Family travel (n=688)	40.3	31.7	26.2	15.7	16.6	12.4	11.3	8.9	9.3	9.3	7.7	7.4	4.7	5.7	5.5	3.5	4.4	4.7	3.3	3.5	3.6	3.3	3.1	4.4	2.0	1.6	1.5	1.5	3.2	15.0	
Travel class	Is business class or higher (n=471)	34.0	27.2	39.7	20.4	21.9	8.9	9.1	12.7	2.1	11.9	9.8	11.0	14.4	14.9	14.9	14.0	5.1	11.0	17.6	8.1	6.8	35.5	12.7	3.6	9.8	7.6	2.5	1.9	2.3	8.1
	Economy class (n=3,529)	36.4	29.9	22.6	15.0	14.0	12.5	11.3	9.7	10.5	8.9	6.9	6.1	5.4	4.9	4.9	4.1	5.3	4.4	3.4	4.6	4.6	0.3	2.7	3.6	1.8	1.7	2.0	2.0	3.5	17.2

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



By airline	Sample	Total	36.2	29.6	24.6	15.6	15.0	12.1	11.1	10.0	9.5	9.2	7.3	6.7	6.5	6.1	6.1	5.3	5.3	5.2	5.1	5.0	4.9	4.5	3.9	3.6	2.8	2.4	2.1	2.1	3.4	16.1
Total	(n=4,000)																															
ANA [Japanese]	(n=100)	33.0	28.0	73.0	3.0	35.0	3.0	12.0	5.0	1.0	5.0	18.0	21.0	6.0	15.0	18.0	10.0	—	17.0	11.0	48.0	7.0	6.0	18.0	2.0	7.0	6.0	—	—	—	3.0	7.0
JAL [Japanese]	(n=100)	36.0	27.0	70.0	—	27.0	2.0	7.0	4.0	3.0	4.0	14.0	17.0	3.0	11.0	20.0	11.0	1.0	23.0	16.0	40.0	12.0	4.0	19.0	—	9.0	9.0	1.0	1.0	1.0	11.0	
● Vanilla Air [Japanese]	(n=100)	44.0	25.0	16.0	4.0	12.0	21.0	9.0	2.0	57.0	3.0	18.0	—	2.0	—	6.0	2.0	6.0	—	2.0	31.0	5.0	—	3.0	—	1.0	3.0	—	—	—	5.0	9.0
● Peach Aviation [Japanese]	(n=100)	40.0	29.0	20.0	1.0	8.0	34.0	15.0	—	61.0	2.0	11.0	1.0	1.0	1.0	1.0	3.0	6.0	1.0	1.0	20.0	6.0	1.0	1.0	—	—	—	—	—	6.0	3.0	2.0
American Airlines [South / North American]	(n=100)	32.0	36.0	19.0	21.0	18.0	12.0	6.0	26.0	1.0	9.0	2.0	6.0	16.0	3.0	1.0	4.0	4.0	6.0	6.0	4.0	4.0	4.0	4.0	4.0	1.0	3.0	4.0	—	—	6.0	12.0
Air Canada [South / North American]	(n=100)	32.0	21.0	20.0	17.0	11.0	10.0	5.0	13.0	—	12.0	3.0	3.0	9.0	2.0	1.0	3.0	5.0	8.0	6.0	2.0	2.0	2.0	2.0	3.0	1.0	2.0	4.0	—	2.0	4.0	23.0
Delta Air Lines [South / North American]	(n=100)	44.0	26.0	15.0	17.0	16.0	8.0	13.0	3.0	—	12.0	8.0	8.0	—	2.0	3.0	3.0	2.0	8.0	3.0	1.0	4.0	5.0	12.0	5.0	3.0	—	—	2.0	1.0	1.0	19.0
United Airlines [South / North American]	(n=100)	35.0	32.0	15.0	17.0	15.0	8.0	11.0	5.0	—	17.0	9.0	5.0	12.0	2.0	2.0	3.0	—	5.0	10.0	3.0	1.0	3.0	5.0	7.0	5.0	2.0	1.0	2.0	3.0	6.0	11.0
Qantas [Pacific / Oceania]	(n=100)	40.0	30.0	43.0	26.0	27.0	5.0	10.0	11.0	1.0	4.0	8.0	8.0	5.0	9.0	7.0	4.0	5.0	5.0	4.0	—	7.0	3.0	5.0	3.0	3.0	3.0	3.0	2.0	2.0	2.0	16.0
● Jetstar [Pacific / Oceania]	(n=100)	56.0	30.0	24.0	13.0	18.0	14.0	8.0	3.0	33.0	9.0	5.0	4.0	2.0	—	1.0	4.0	14.0	3.0	1.0	6.0	8.0	2.0	—	5.0	3.0	2.0	1.0	1.0	5.0	10.0	
Air New Zealand [Pacific / Oceania]	(n=100)	50.0	25.0	44.0	29.0	10.0	1.0	11.0	9.0	—	13.0	6.0	10.0	13.0	6.0	6.0	8.0	1.0	7.0	5.0	3.0	3.0	8.0	5.0	5.0	4.0	2.0	2.0	1.0	2.0	21.0	
Hawaiian Airlines [Pacific / Oceania]	(n=100)	47.0	32.0	15.0	20.0	14.0	11.0	20.0	7.0	1.0	8.0	6.0	5.0	1.0	6.0	3.0	—	1.0	2.0	2.0	1.0	2.0	4.0	—	5.0	—	—	—	2.0	5.0	17.0	
Asiana Airlines [Asian]	(n=100)	29.0	33.0	21.0	16.0	10.0	12.0	12.0	1.0	1.0	5.0	8.0	6.0	4.0	6.0	6.0	4.0	3.0	4.0	5.0	1.0	4.0	2.0	3.0	3.0	2.0	3.0	2.0	—	3.0	8.0	15.0
● AirAsia X [Asian]	(n=100)	38.0	34.0	7.0	10.0	16.0	27.0	11.0	11.0	50.0	6.0	6.0	1.0	1.0	4.0	1.0	3.0	13.0	5.0	1.0	2.0	14.0	2.0	—	3.0	1.0	—	1.0	1.0	5.0	9.0	
Eva Air [Asian]	(n=100)	44.0	34.0	29.0	21.0	6.0	9.0	16.0	2.0	2.0	2.0	7.0	2.0	5.0	2.0	5.0	4.0	4.0	5.0	3.0	—	2.0	4.0	1.0	3.0	2.0	1.0	4.0	3.0	5.0	20.0	
Garuda Indonesia [Asian]	(n=100)	58.0	30.0	15.0	24.0	12.0	9.0	9.0	10.0	2.0	2.0	6.0	9.0	3.0	2.0	6.0	7.0	1.0	1.0	3.0	5.0	1.0	4.0	10.0	1.0	2.0	1.0	—	3.0	—	3.0	10.0
Cathay Pacific Airways [Asian]	(n=100)	27.0	30.0	36.0	13.0	20.0	8.0	15.0	12.0	5.0	14.0	4.0	7.0	5.0	5.0	7.0	7.0	3.0	7.0	6.0	2.0	5.0	6.0	—	7.0	2.0	3.0	4.0	—	1.0	2.0	23.0
● Jetstar Asia Airways [Asian]	(n=100)	50.0	38.0	13.0	4.0	7.0	24.0	17.0	3.0	45.0	5.0	6.0	5.0	2.0	—	6.0	4.0	18.0	2.0	2.0	4.0	14.0	—	3.0	2.0	3.0	3.0	1.0	—	3.0	6.0	
Singapore Airlines [Asian]	(n=100)	32.0	25.0	49.0	22.0	30.0	2.0	10.0	9.0	1.0	9.0	9.0	13.0	4.0	17.0	24.0	13.0	—	5.0	8.0	4.0	1.0	4.0	2.0	3.0	7.0	4.0	8.0	1.0	3.0	10.0	
● Tigerair Taiwan [Asian]	(n=100)	64.0	46.0	3.0	9.0	2.0	21.0	27.0	2.0	51.0	3.0	4.0	3.0	1.0	1.0	1.0	2.0	14.0	1.0	1.0	1.0	6.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	3.0	6.0
Korean Air [Asian]	(n=100)	43.0	36.0	20.0	20.0	18.0	12.0	13.0	6.0	2.0	14.0	13.0	9.0	3.0	6.0	9.0	3.0	3.0	3.0	1.0	—	—	—	—	—	1.0	3.0	2.0	—	2.0	2.0	17.0
Thai Airways [Asian]	(n=100)	38.0	34.0	33.0	27.0	11.0	12.0	16.0	16.0	1.0	5.0	8.0	6.0	18.0	3.0	5.0	6.0	3.0	2.0	4.0	1.0	5.0	3.0	8.0	5.0	1.0	1.0	2.0	—	8.0	9.0	
● Jeju Air [Asian]	(n=100)	42.0	35.0	9.0	13.0	6.0	19.0	16.0	—	42.0	5.0	5.0	2.0	1.0	—	—	1.0	16.0	2.0	—	—	9.0	—	2.0	1.0	—	—	—	—	5.0	4.0	13.0
China Airlines [Asian]	(n=100)	37.0	29.0	13.0	15.0	8.0	16.0	12.0	3.0	6.0	6.0	14.0	4.0	5.0	9.0	4.0	4.0	6.0	—	3.0	—	—	—	—	1.0	2.0	2.0	3.0	2.0	5.0	23.0	
Air China [Asian]	(n=100)	34.0	31.0	7.0	15.0	9.0	19.0	12.0	5.0	—	7.0	4.0	—	7.0	2.0	—	4.0	11.0	8.0	3.0	—	4.0	1.0	2.0	3.0	—	—	3.0	1.0	2.0	1.0	16.0
China Eastern Airlines [Asian]	(n=100)	25.0	24.0	7.0	10.0	3.0	11.0	14.0	1.0	3.0	12.0	2.0	2.0	3.0	—	—	—	6.0	5.0	—	—	5.0	—	3.0	1.0	—	—	—	3.0	7.0	24.0	
Philippines Airlines [Asian]	(n=100)	55.0	36.0	10.0	26.0	9.0	9.0	10.0	8.0	—	3.0	7.0	1.0	6.0	4.0	4.0	1.0	3.0	7.0	—	2.0	8.0	1.0	4.0	1.0	1.0	5.0	1.0	6.0	15.0		
Vietnam Airlines [Asian]	(n=100)	41.0	21.0	14.0	21.0	7.0	11.0	7.0	—	13.0	7.0	5.0	—	5.0	3.0	3.0	—	1.0	2.0	2.0	1.0	4.0	1.0	4.0	—	1.0	1.0	—	1.0	2.0	2.0	20.0
Aeroflot [European]	(n=100)	14.0	26.0	11.0	7.0	8.0	25.0	8.0	22.0	3.0	5.0	3.0	4.0	12.0	1.0	2.0	6.0	13.0	5.0	7.0	3.0	6.0	7.0	3.0	5.0	2.0	3.0	3.0	3.0	2.0	27.0	
Alitalia [European]	(n=100)	44.0	25.0	11.0	22.0	15.0	10.0	2.0	7.0	—	10.0	5.0	2.0	4.0	9.0	4.0	2.0	—	5.0	3.0	—	4.0	6.0	2.0	3.0	—	—	4.0	2.0	2.0	28.0	
Air France [European]	(n=100)	36.0	34.0	42.0	27.0	31.0	7.0	11.0	12.0	—	10.0	8.0	12.0	4.0	15.0	10.0	5.0	—	6.0	7.0	1.0	1.0	9.0	4.0	5.0	3.0	5.0	4.0	3.0	4.0	13.0	
LOT Polish Airlines [European]	(n=100)	51.0	27.0	24.0	22.0	15.0	13.0	12.0	15.0	5.0	15.0	11.0	15.0	13.0	11.0	16.0	8.0	9.0	14.0	7.0	8.0	8.0	14.0	8.0	8.0	11.0	3.0	2.0	3.0	11.0		
KLM Royal Dutch Airlines [European]	(n=100)	20.0	40.0	30.0	9.0	20.0	7.0	11.0	28.0	—	6.0	8.0	11.0	8.0	12.0	8.0	7.0	5.0	3.0	8.0	2.0	5.0	7.0	5.0	9.0	5.0	2.0	5.0	3.0	3.0	13.0	
Scandinavian Airlines [European]	(n=100)	30.0	29.0	27.0	23.0	22.0	15.0	8.0	24.0	—	11.0	7.0	7.0	15.0	14.0	14.0	12.0	9.0	8.0	13.0	1.0	7.0	12.0	8.0	4.0	9.0	10.0	1.0	2.0	—	23.0	
Finnair [European]	(n=100)	25.0	23.0	25.0	16.0	10.0	5.0	5.0	25.0	—	16.0	4.0	3.0	13.0	5.0	6.0	3.0	2.0	2.0	4.0	2.0	2.0	5.0	11.0	4.0	6.0	3.0					

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	Seat upgrade	Blankets, pillows, slippers	LCD monitor, earphones	In-flight sales	Wi-Fi/Internet connection	Airline lounge	Newspapers, magazines	Other	Didn't use optional services that were not free	
Total		(n=4,000)	11.1	10.5	7.3	5.3	4.5	3.2	3.2	3.0	2.4	1.9	1.9	1.2	0.1	76.8	
By airline	ANA [Japanese]	(n=100)	11.0	9.0	8.0	6.0	2.0	4.0	5.0	6.0	4.0	1.0	5.0	3.0	—	74.0	
	JAL [Japanese]	(n=100)	5.0	6.0	5.0	3.0	2.0	3.0	1.0	3.0	5.0	1.0	1.0	—	—	83.0	
	● Vanilla Air [Japanese]	(n=100)	25.0	29.0	15.0	10.0	8.0	2.0	3.0	2.0	4.0	3.0	—	—	—	45.0	
	● Peach Aviation [Japanese]	(n=100)	25.0	35.0	3.0	6.0	11.0	6.0	—	2.0	3.0	2.0	—	—	—	43.0	
	<hr/>																
	American Airlines [South / North American]		(n=100)	10.0	17.0	5.0	6.0	3.0	4.0	6.0	5.0	3.0	4.0	4.0	4.0	1.0	72.0
	Air Canada [South / North American]		(n=100)	9.0	10.0	4.0	4.0	2.0	2.0	5.0	4.0	1.0	—	—	1.0	—	83.0
	Delta Air Lines [South / North American]		(n=100)	13.0	5.0	8.0	6.0	4.0	4.0	3.0	4.0	—	1.0	2.0	2.0	—	79.0
	United Airlines [South / North American]		(n=100)	9.0	5.0	6.0	4.0	3.0	3.0	2.0	2.0	2.0	3.0	—	—	—	85.0
	<hr/>																
	Qantas [Pacific / Oceania]		(n=100)	11.0	11.0	6.0	5.0	3.0	5.0	4.0	3.0	3.0	1.0	2.0	1.0	—	80.0
	● Jetstar [Pacific / Oceania]		(n=100)	33.0	26.0	25.0	15.0	17.0	5.0	14.0	11.0	3.0	6.0	5.0	4.0	—	43.0
	Air New Zealand [Pacific / Oceania]		(n=100)	6.0	9.0	4.0	2.0	6.0	5.0	4.0	2.0	1.0	1.0	1.0	1.0	—	81.0
	Hawaiian Airlines [Pacific / Oceania]		(n=100)	7.0	5.0	2.0	1.0	1.0	6.0	1.0	1.0	3.0	—	—	—	1.0	79.0
	<hr/>																
	Asiana Airlines [Asian]		(n=100)	11.0	2.0	6.0	1.0	5.0	2.0	1.0	1.0	1.0	—	1.0	1.0	—	81.0
	● AirAsia X [Asian]		(n=100)	31.0	21.0	34.0	19.0	17.0	4.0	3.0	—	—	—	2.0	—	—	36.0
	Eva Air [Asian]		(n=100)	5.0	5.0	7.0	5.0	1.0	2.0	2.0	3.0	2.0	—	1.0	1.0	—	87.0
	Garuda Indonesia [Asian]		(n=100)	3.0	5.0	2.0	1.0	3.0	4.0	1.0	1.0	1.0	—	2.0	1.0	—	89.0
	Cathay Pacific Airways [Asian]		(n=100)	4.0	5.0	1.0	—	3.0	1.0	—	—	1.0	—	2.0	—	—	89.0
	● Jetstar Asia Airways [Asian]		(n=100)	26.0	36.0	17.0	13.0	17.0	5.0	5.0	5.0	6.0	7.0	2.0	1.0	—	45.0
	Singapore Airlines [Asian]		(n=100)	9.0	11.0	8.0	6.0	1.0	2.0	8.0	6.0	2.0	—	4.0	2.0	—	81.0
	● Tigerair Taiwan [Asian]		(n=100)	22.0	23.0	20.0	10.0	10.0	2.0	3.0	2.0	1.0	1.0	1.0	1.0	—	57.0
	Korean Air [Asian]		(n=100)	8.0	4.0	2.0	3.0	1.0	—	1.0	1.0	—	2.0	—	1.0	—	90.0
	Thai Airways [Asian]		(n=100)	5.0	6.0	5.0	3.0	1.0	—	2.0	1.0	1.0	—	1.0	1.0	—	89.0
	● Jeju Air [Asian]		(n=100)	13.0	8.0	4.0	5.0	5.0	2.0	—	1.0	2.0	—	—	—	—	72.0
	China Airlines [Asian]		(n=100)	9.0	5.0	7.0	7.0	—	—	3.0	5.0	1.0	2.0	—	2.0	—	86.0
	Air China [Asian]		(n=100)	5.0	3.0	2.0	3.0	—	—	1.0	—	—	—	1.0	1.0	1.0	91.0
	China Eastern Airlines [Asian]		(n=100)	8.0	7.0	5.0	3.0	4.0	—	3.0	3.0	1.0	—	1.0	—	—	85.0
	Philippines Airlines [Asian]		(n=100)	8.0	4.0	5.0	3.0	4.0	6.0	3.0	1.0	2.0	—	—	—	—	83.0
	Vietnam Airlines [Asian]		(n=100)	6.0	4.0	5.0	4.0	—	—	1.0	—	—	—	2.0	—	—	89.0
	<hr/>																
	Aeroflot [European]		(n=100)	8.0	5.0	3.0	2.0	5.0	—	2.0	2.0	1.0	1.0	1.0	1.0	—	88.0
	Alitalia [European]		(n=100)	2.0	4.0	1.0	1.0	2.0	1.0	—	—	2.0	—	1.0	—	—	93.0
	Air France [European]		(n=100)	4.0	12.0	11.0	7.0	4.0	4.0	4.0	2.0	5.0	3.0	3.0	1.0	—	73.0
	LOT Polish Airlines [European]		(n=100)	24.0	20.0	21.0	14.0	14.0	16.0	15.0	14.0	13.0	14.0	15.0	12.0	—	62.0
	KLM Royal Dutch Airlines [European]		(n=100)	14.0	20.0	8.0	6.0	6.0	5.0	5.0	6.0	4.0	8.0	3.0	2.0	—	67.0
	Scandinavian Airlines [European]		(n=100)	14.0	17.0	7.0	7.0	7.0	4.0	4.0	6.0	5.0	7.0	5.0	3.0	—	71.0
	Finnair [European]		(n=100)	3.0	2.0	—	1.0	1.0	7.0	1.0	1.0	3.0	—	1.0	—	—	89.0
	British Airways [European]		(n=100)	6.0	6.0	1.0	1.0	1.0	3.0	1.0	—	6.0	—	1.0	—	—	81.0
Lufthansa [European]		(n=100)	7.0	6.0	6.0	5.0	—	4.0	3.0	5.0	1.0	2.0	1.0	—	—	89.0	
<hr/>																	
Emirates [Middle East / Africa]		(n=100)	12.0	5.0	3.0	5.0	1.0	1.0	4.0	3.0	2.0	2.0	1.0	—	1.0	81.0	
Qatar Airways [Middle East / Africa]		(n=100)	5.0	5.0	6.0	6.0	2.0	3.0	3.0	2.0	1.0	2.0	3.0	1.0	—	88.0	
Turkish Airlines [Middle East / Africa]		(n=100)	8.0	3.0	3.0	3.0	3.0	—	2.0	3.0	—	—	—	—	—	91.0	

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

Part 2: Airline Evaluations



1. Overall Satisfaction: Top 20

- The overall satisfaction score total average was 3.67 points.
- The Japan Airlines score was 4.16 points, moving it from 4th place last year to the top position. In 2nd place was ANA (4.15 points), which was followed by Air New Zealand (4.12 points).
- Finnair (3.93 points) saw its ranking increase from 14th place last year to 7th place, while Lufthansa (3.90 points) made a significant climb from 21st place last year to 8th place.
- Singapore Airlines (4.05 points) dropped from 1st place last year (4.32 points) to 4th place.
- Airline Overall Satisfaction (Total / Single Answer)

				Legend					Satisfaction points	Satisfaction points last year	
Order this year	Order last year	Changes in order		Am satisfied	More satisfied than not	Can't say either way	More dissatisfied than not	Am dissatisfied			
Total				(n=4,000)	14.1%	50.6	25.8	7.0	2.6	3.67	3.69
By airline											
1	(4)	↑	JAL [Japanese]	(n=100)	33.0	50.0	17.0	0.0	0.0	4.16	4.03
2	(2)	-	ANA [Japanese]	(n=100)	26.0	63.0	11.0	0.0	0.0	4.15	4.14
3	(4)	↑	Air New Zealand [Pacific / Oceania]	(n=100)	32.0	50.0	16.0	2.0	0.0	4.12	4.03
4	(1)	↓	Singapore Airlines [Asian]	(n=100)	30.0	50.0	16.0	3.0	1.0	4.05	4.32
5	(10)	↑	Qatar Airways [Middle East / Africa]	(n=100)	20.0	59.0	19.0	2.0	0.0	3.97	3.87
6	(4)	↓	Emirates [Middle East / Africa]	(n=100)	24.0	54.0	16.0	4.0	2.0	3.94	4.03
7	(14)	↑	Finnair [European]	(n=100)	18.0	63.0	14.0	4.0	1.0	3.93	3.83
8	(7)	↓	Air France [European]	(n=100)	19.0	61.0	15.0	1.0	4.0	3.90	3.92
8	(21)	↑	Lufthansa [European]	(n=100)	20.0	54.0	22.0	4.0	0.0	3.90	3.72
10	(7)	↓	Thai Airways [Asian]	(n=100)	17.0	59.0	19.0	3.0	2.0	3.86	3.92
11	(13)	↑	Cathay Pacific Airways [Asian]	(n=100)	10.0	66.0	21.0	3.0	0.0	3.83	3.84
12	(3)	↓	KLM Royal Dutch Airlines [European]	(n=100)	13.0	63.0	17.0	5.0	2.0	3.80	4.04
12	(18)	↑	Turkish Airlines [Middle East / Africa]	(n=100)	18.0	56.0	14.0	12.0	0.0	3.80	3.73
14	(17)	↑	Qantas [Pacific / Oceania]	(n=100)	20.0	47.0	27.0	4.0	2.0	3.79	3.76
14	*	*	LOT Polish Airlines [European]	(n=100)	24.0	40.0	30.0	3.0	3.0	3.79	*
16	(15)	↓	Asiana Airlines [Asian]	(n=100)	11.0	58.0	27.0	4.0	0.0	3.76	3.77
16	(12)	↓	Eva Air [Asian]	(n=100)	17.0	50.0	26.0	6.0	1.0	3.76	3.85
16	(23)	↑	Korean Air [Asian]	(n=100)	12.0	58.0	25.0	4.0	1.0	3.76	3.71
19	*	*	● Tigerair Taiwan [Asian]	(n=100)	16.0	53.0	23.0	6.0	2.0	3.75	*
20	(18)	↓	China Airlines [Asian]	(n=100)	9.0	61.0	27.0	1.0	2.0	3.74	3.73
20	*	*	Scandinavian Airlines [European]	(n=100)	19.0	48.0	23.0	8.0	2.0	3.74	*
20	(26)	↑	Delta Air Lines [South / North American]	(n=100)	11.0	59.0	23.0	7.0	0.0	3.74	3.60

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

2. Satisfaction by Attribute

1) Aircraft Equipment and Amenities: Top 20

- The total average satisfaction score for "Airline equipment, facilities" was 3.52 points.
- The Air New Zealand score was 4.10 points, which led to an increase in ranking from 4th place last year to the top spot. This was followed by Japan Airlines (4.00 points) and Emirates (3.94 points).
- Qatar Airways (3.89 points) went from 11th place last year to 4th place, while Lufthansa (3.71 points) saw a huge increase in ranking from 26th place to 12th place.
- Among reasons for satisfaction and reasons for dissatisfaction, "The aircraft and new/nice" and "Seat width/comfort" were ranked at the top.

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

Order this year	Order last year	Changes in order	Airline	Sample (n)	Legend					Satisfaction points	Satisfaction points last year	
					Am satisfied	More satisfied than not	Can't say either way	More dissatisfied than not	Am dissatisfied			
Total					(n=4,000)	12.0%	41.7	35.0	8.8	2.6	3.52	3.55
By airline	1	(4)	↑	Air New Zealand [Pacific / Oceania]	(n=100)	30.0	51.0	18.0	1.0	0.0	4.10	3.89
	2	(6)	↑	JAL [Japanese]	(n=100)	26.0	50.0	22.0	2.0	0.0	4.00	3.78
	3	(3)	-	Emirates [Middle East / Africa]	(n=100)	25.0	50.0	21.0	2.0	2.0	3.94	3.98
	4	(11)	↑	Qatar Airways [Middle East / Africa]	(n=100)	18.0	54.0	27.0	1.0	0.0	3.89	3.74
	5	(2)	↓	ANA [Japanese]	(n=100)	17.0	55.0	25.0	3.0	0.0	3.86	3.99
	6	(1)	↓	Singapore Airlines [Asian]	(n=100)	23.0	47.0	24.0	4.0	2.0	3.85	4.08
	7	(12)	↑	Finnair [European]	(n=100)	15.0	56.0	25.0	3.0	1.0	3.81	3.73
	8	(13)	↑	Air France [European]	(n=100)	17.0	54.0	24.0	2.0	3.0	3.80	3.72
	9	*	*	LOT Polish Airlines [European]	(n=100)	28.0	37.0	24.0	8.0	3.0	3.79	*
	10	(7)	↓	KLM Royal Dutch Airlines [European]	(n=100)	12.0	59.0	24.0	3.0	2.0	3.76	3.77
	11	*	*	Scandinavian Airlines [European]	(n=100)	16.0	48.0	29.0	6.0	1.0	3.72	*
	12	(9)	↓	Thai Airways [Asian]	(n=100)	12.0	55.0	25.0	8.0	0.0	3.71	3.75
	12	(26)	↑	Lufthansa [European]	(n=100)	15.0	46.0	34.0	5.0	0.0	3.71	3.49
	14	(19)	↑	Garuda Indonesia [Asian]	(n=100)	17.0	43.0	34.0	5.0	1.0	3.70	3.64
	15	(20)	↑	Korean Air [Asian]	(n=100)	9.0	53.0	35.0	3.0	0.0	3.68	3.63
	15	(9)	↓	Qantas [Pacific / Oceania]	(n=100)	16.0	43.0	34.0	7.0	0.0	3.68	3.75
	17	(18)	↑	Turkish Airlines [Middle East / Africa]	(n=100)	13.0	47.0	35.0	4.0	1.0	3.67	3.67
	18	(15)	↓	Eva Air [Asian]	(n=100)	17.0	38.0	39.0	4.0	2.0	3.64	3.71
	18	(17)	↓	Cathay Pacific Airways [Asian]	(n=100)	8.0	57.0	27.0	7.0	1.0	3.64	3.68
	20	(24)	↑	Delta Air Lines [South / North American]	(n=100)	11.0	44.0	39.0	5.0	1.0	3.59	3.51

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

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

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

Sample		Newness/ cleanness of plane	Width/ comfort of seats	Comfort of temperature/ climate control/ light control	Wi-Fi/ Internet connection	Extent of in-flight amenities available	Comfort of toilets	Other	Nothing in particular
Reasons for satisfaction	2,148	37.8	35.2	27.5	6.8	19.1	12.5	1.7	22.4
Reasons for dissatisfaction	1,852	15.2	30.8	7.9	6.5	12.2	9.5	2.7	43.3

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

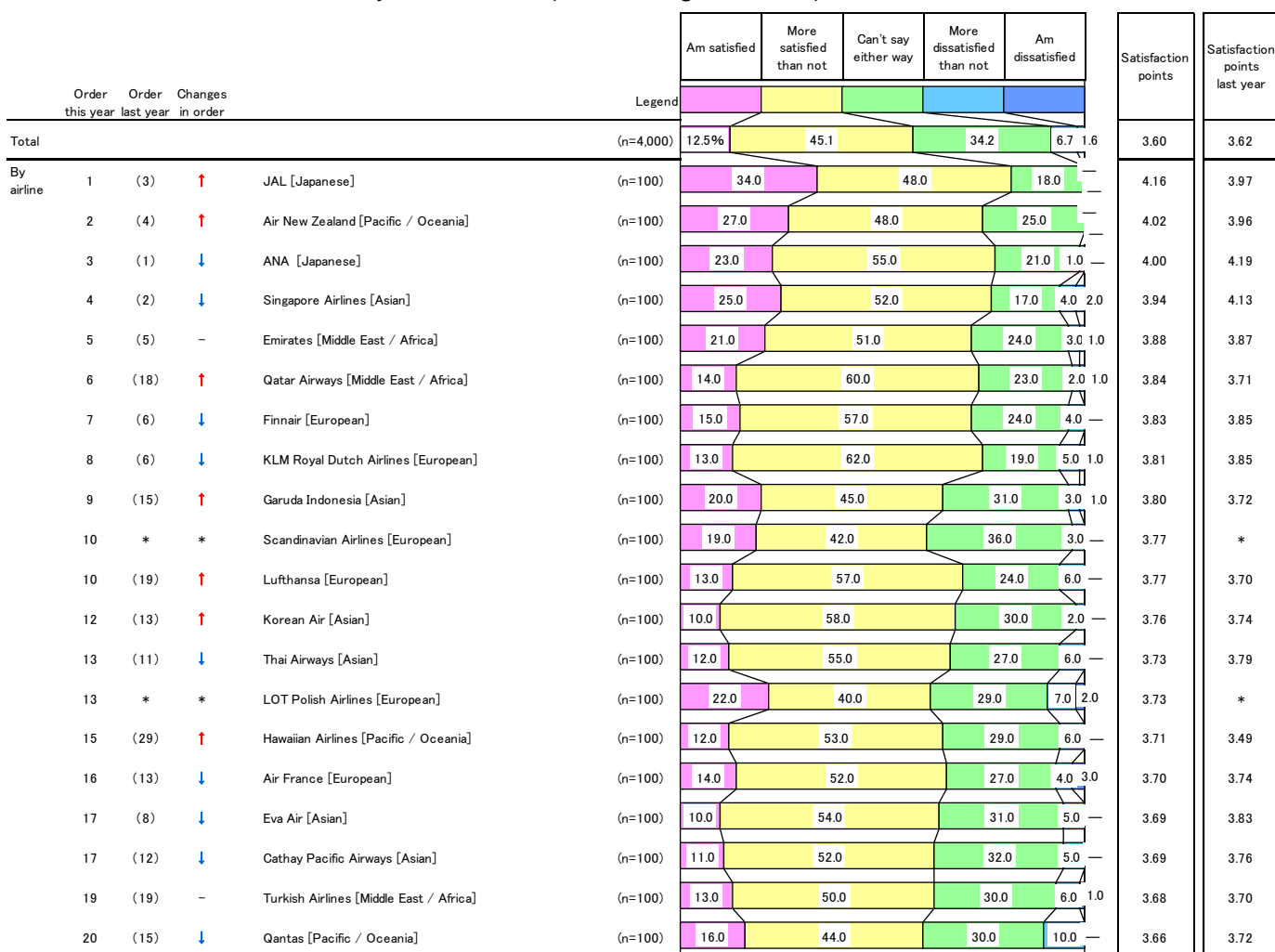
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

2. Satisfaction by Attribute

2) Service by Cabin Crew: Top 20

- For "Customer service by cabin crew" the satisfaction total average was 3.60 points.
- The Japan Airlines score was 4.16 points, which moved it from 3rd place last year to the top spot. This was followed by Air New Zealand (4.02 points) and ANA (4.00 points), which means that two of the three top carriers were Japanese.
- Qatar Airways (3.84 points) went from 18th place last year to 6th place, while Hawaiian Airlines (3.71 points) saw a spike, going from 29th place last year to 15th place this year.
- Among both the reasons for satisfaction and reasons for dissatisfaction, "Courteousness of service" was given most.

■ 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.

† 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	2,301	22.0	55.3	25.3	17.7	1.0	21.4
Reasons for dissatisfaction	1,699	7.6	25.8	8.1	4.7	4.6	58.7

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

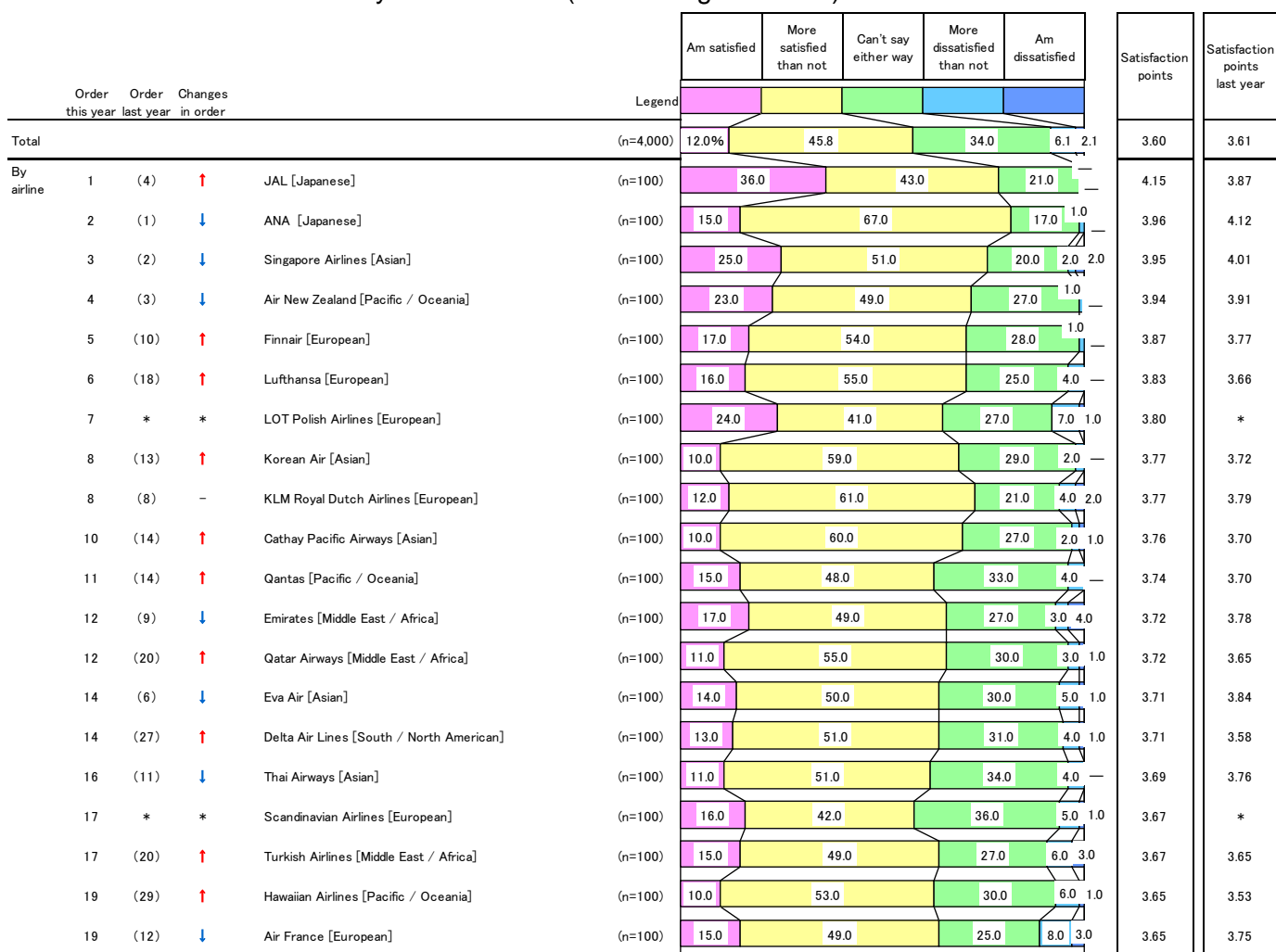
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

2. Satisfaction by Attribute

3) Service by Ground Crew: Top 20

- For "Customer service by the airline ground crew at the airport," the satisfaction total average was 3.60 points.
- The Japan Airlines score was 4.15 points, which moved it from 4th place last year to the top spot. This was followed by ANA (3.96 points) and Singapore Airlines (3.95 points), which means that two of the top three carriers were Japanese.
- The Lufthansa score was 3.83 points, which moved it from 18th place last year to 6th place, while Delta Air Line's score of 3.71 points led to an increase ranking from 27th place last year to 14th place.
- Among both the reasons for satisfaction and reasons for dissatisfaction, "Smoothness of check-in/checking bags" was given most.

■ 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	2,312	64.5	28.9	15.6	5.7	24.3
Reasons for dissatisfaction	1,688	22.0	11.8	6.6	3.7	62.3

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

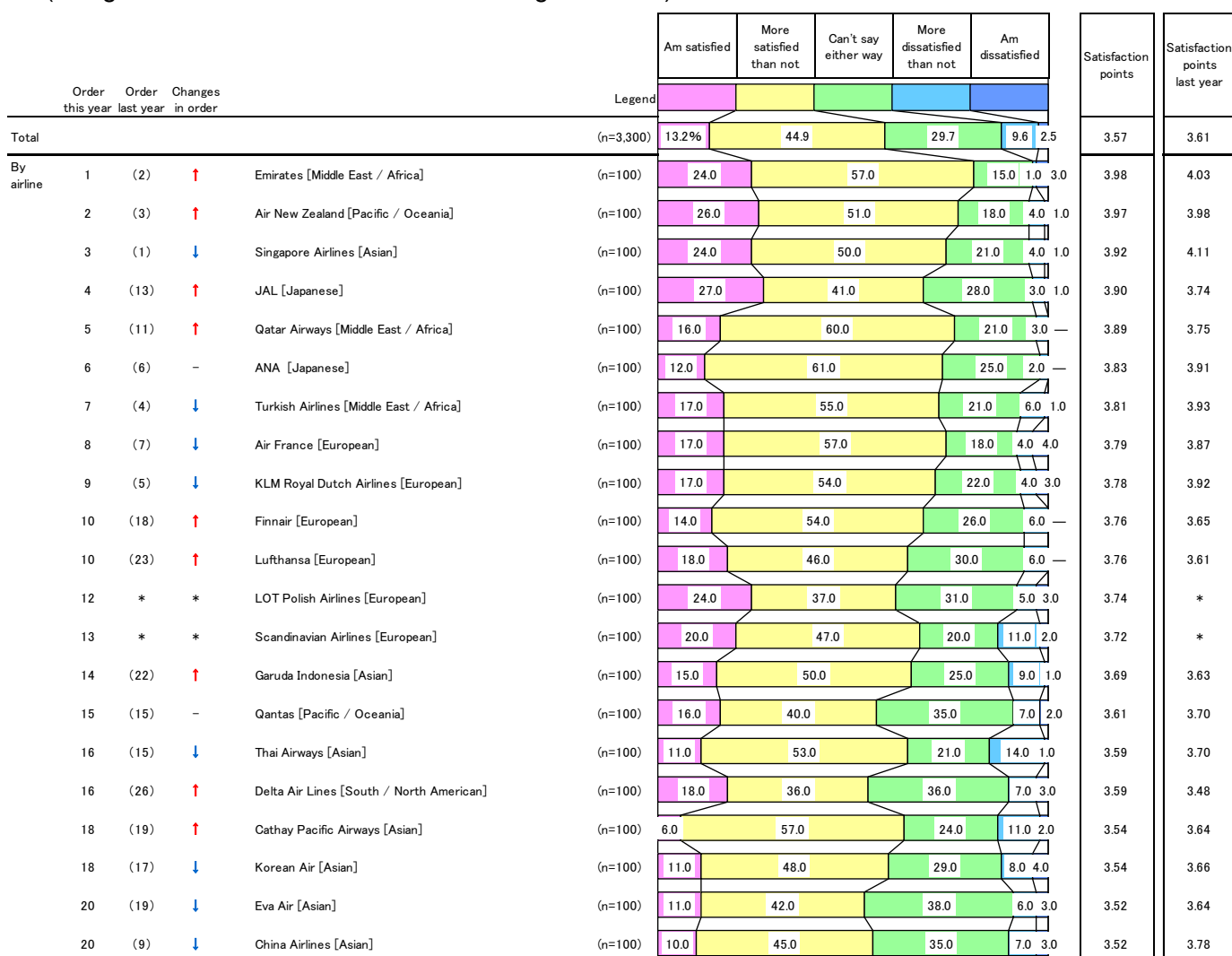
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

2. Satisfaction by Attribute

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

- The "Inflight food and drink service" the satisfaction total average was 3.57 points.
- The Emirates score was 3.98 points, which moved it from 2nd place year to the top spot. This was followed by Air New Zealand (3.97 points) and Singapore Airlines (3.92 points).
- Among both the reasons for satisfaction and reasons for dissatisfaction, "The taste of the food" was given most.

■ 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.

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

† Tabulation excludes airlines with less than 80s: AirAsia X, Jetstar Asia Airways, Tiger Air Taiwan, Cheju Airlines, Jetstar Airlines, Vanilla Air, Peach Aviation.

■ 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	1,918	64.4	42.7	28.2	33.2	31.3	35.5	0.5	5.5
Reasons for dissatisfaction	1,382	53.1	12.4	9.0	4.8	7.7	12.5	2.3	27.2

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

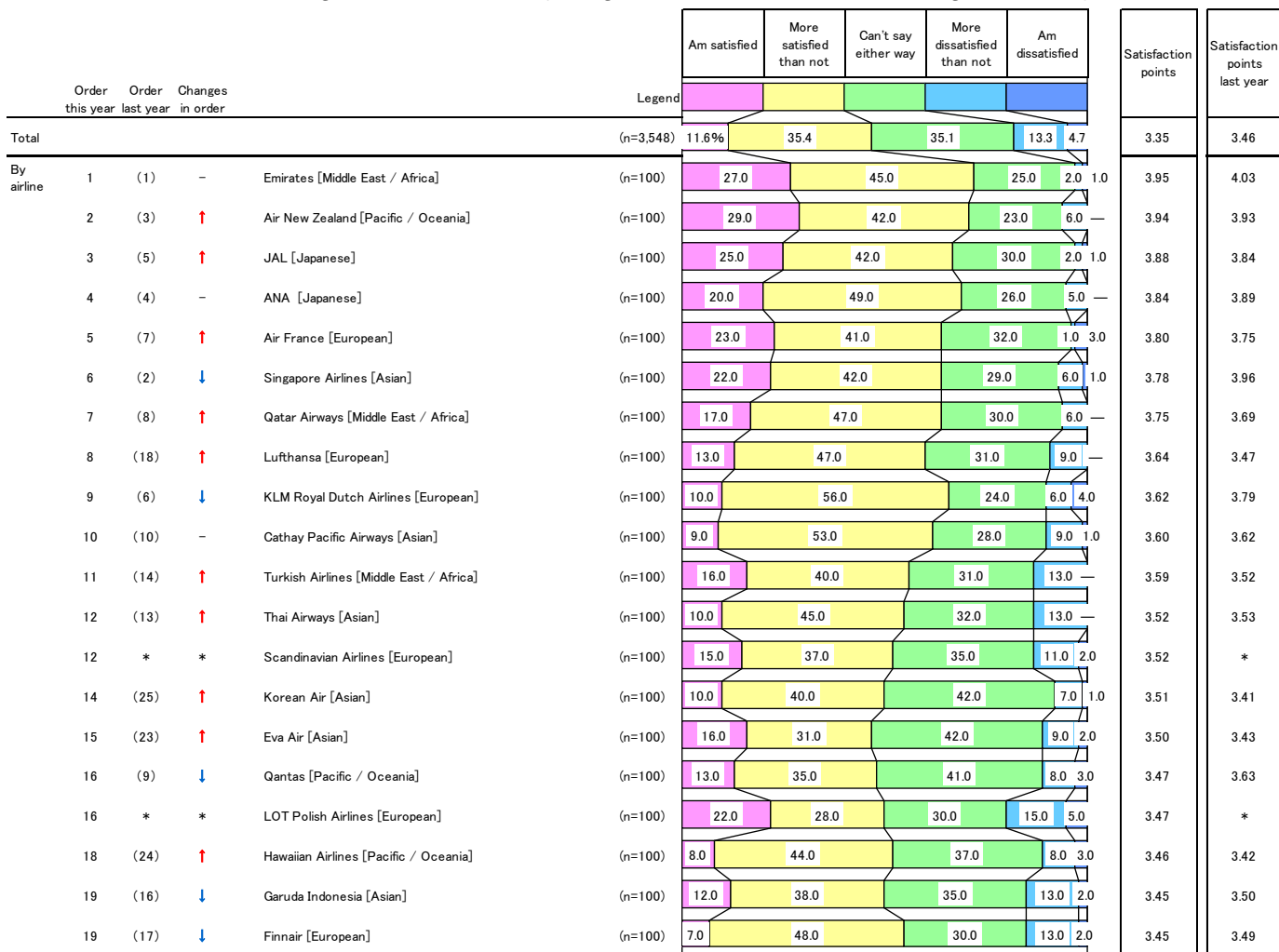
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

2. Satisfaction by Attribute

5) In-flight Entertainment: Top 20

- The "Inflight entertainment" the satisfaction total average was 3.35 points, which was the lowest score among all five categories.
- With a score of 3.95 points, Emirates maintained its place at the top for the second consecutive year. This was followed by Air New Zealand (3.94 points) and Japan Airlines (3.88 points).
- As both reasons for satisfaction and reasons for dissatisfaction, "Movie/program content" and "Number of movies/TV channels" were given far more than others.

■ 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.

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

† Tabulation excludes airlines with less than 80s: Tiger Air Taiwan, Cheju Airlines, Vanilla Air, Peach Aviation.

■ 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	1,667	45.2	52.1	13.4	13.2	8.7	8.9	6.5	3.7	4.9	10.6	3.1	0.3	17.4
Reasons for dissatisfaction	1,881	22.4	35.9	7.2	8.4	4.6	5.4	3.9	1.2	2.7	7.1	2.3	3.7	42.2

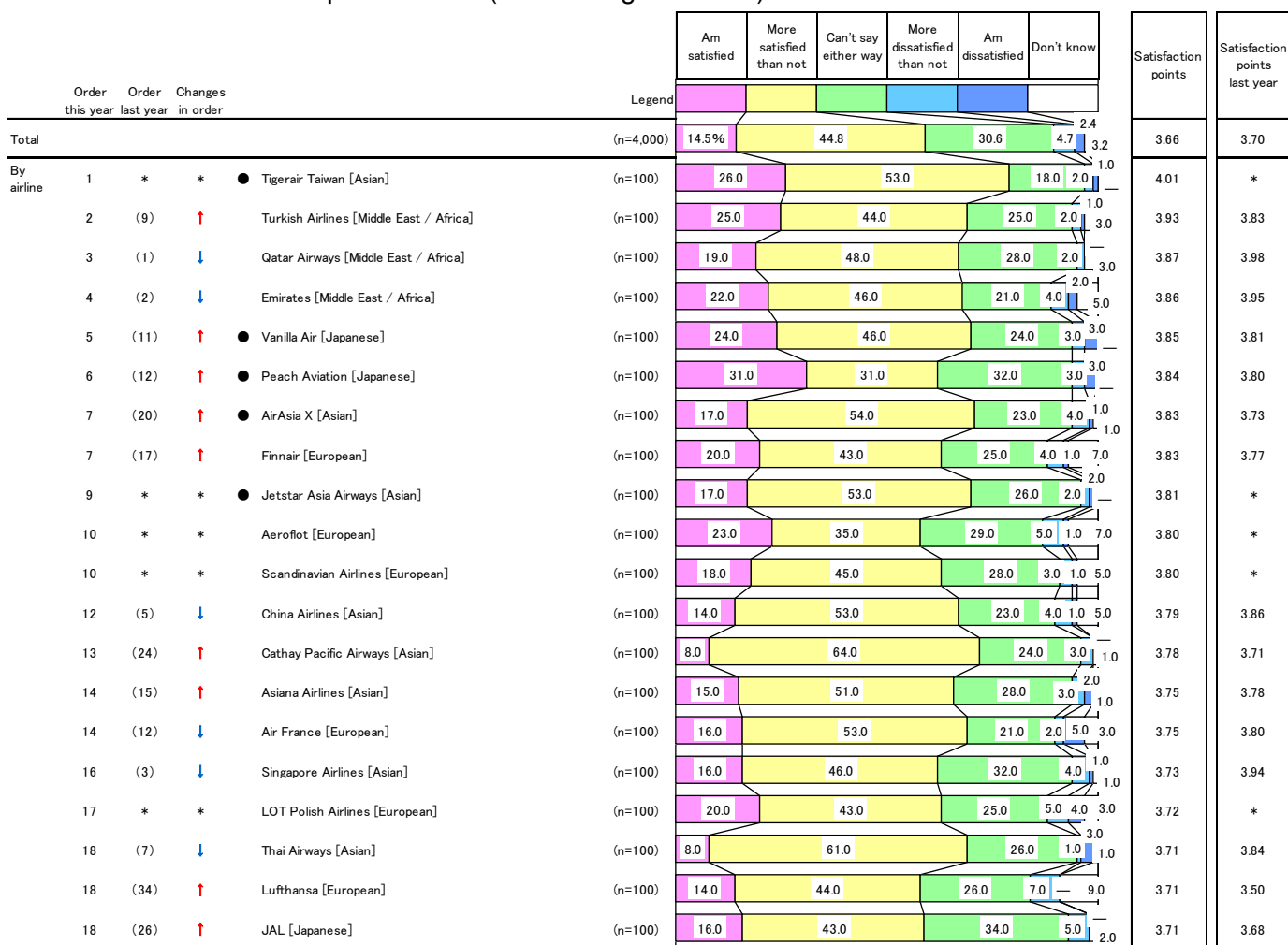
† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

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

3. Satisfaction with Cost Performance: TOP20

- The cost performance satisfaction total average was 3.66 points.
- At the top of the ranking was the LCC Tigerair Taiwan (4.01 points). This was followed by Turkish Airlines (3.93 points) and Qatar Airways (3.87 points).
- Among both the reasons for satisfaction and reasons for dissatisfaction, "Air ticket prices" was given most.

■ 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.
 † Airlines noted with an asterisk are those for which comparisons are not available because they were not included in the prior survey.
 † ● indicates a low-cost carrier (LCC)

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

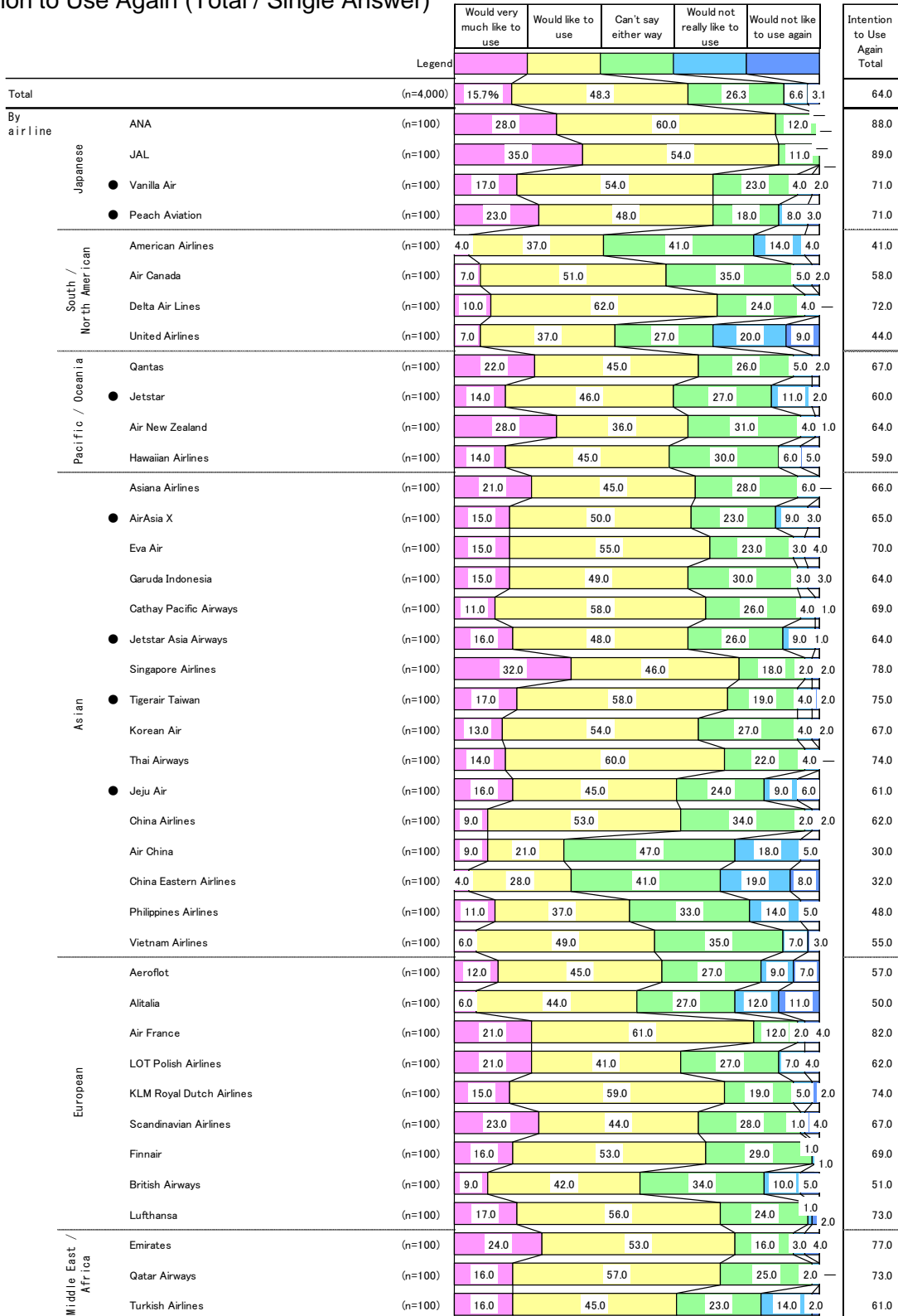
Sample	Air fare ticket	Inflight food/drink and service	Service by cabin crew	Service by ground crew	Equipment on aircraft	Inflight entertainment	Safety/reliability	Other	None of the above	
Reasons for satisfaction	2,370	65.2	41.4	34.3	21.8	22.4	21.5	27.8	2.0	3.6
Reasons for dissatisfaction	1,504	32.8	26.2	15.1	10.2	15.5	19.7	8.0	5.9	27.3

† "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

- Regarding intention to use again, the "Intention to use again – total" (that is, including "I'd very much like to use" (16%)) was 64%.
- By airline, at the top of the "Intention to use again - total" ranking was Japan Airlines (89%). This was followed by ANA (88%) and Air France (82%).
- Among LCC, the Tigerair Taiwan "intention to use again – total" was 75%, which was 6th place among 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 about airlines they would like to use again, the highest percentage gave ANA (58%), which was the same result as last year. This was followed by Japan Airlines (51%), an indication that the two Japanese carriers have maintained high use intention scores.

● Among the LCCs, Peach Aviation ranked in 5th place with a score of 7%.

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

		2017 Survey (n=4,000) (%)		2017 Survey (n=4,000) (%)	2016 Survey Ranking (n=4,000)	Rate of increase	
1	ANA [Japanese]	58	58.3	58.3	1	54.4	↑
2	JAL [Japanese]	51	50.9	50.9	2	45.8	↓
3	Singapore Airlines [Asian]	20	17.1	17.1	3	20.2	↓
4	Emirates [Middle East / Africa]	13	13.8	13.8	4	16.2	↓
5	● Peach Aviation [Japanese]	7	7.4	7.4	6	6.7	—
6	Lufthansa [European]	6	6.6	6.6	5	7.3	—
7	Air France [European]	5	5.9	5.9	8	5.7	—
8	● Vanilla Air [Japanese]	5	5.2	5.2	11	4.2	↑
9	Delta Air Lines [South / North American]	5	5.1	5.1	7	6.1	↓
10	Finnair [European]	4	4.2	4.2	12	4.0	—
11	Cathay Pacific Airways [Asian]	4	4.0	4.0	9	5.3	↓
12	Hawaiian Airlines [Pacific / Oceania]	3	3.9	3.9	14	3.7	—
13	Air New Zealand [Pacific / Oceania]	3	3.5	3.5	16	3.5	—
14	Thai Airways [Asian]	3	3.4	3.4	15	3.6	—
15	Qatar Airways [Middle East / Africa]	3	3.3	3.3	13	3.9	—
16	Qantas [Pacific / Oceania]	3	3.1	3.1	17	3.3	—
17	KLM Royal Dutch Airlines [European]	3	3.0	3.0	18	3.1	—
18	Air Canada [South / North American]	3	3.0	3.0	20	2.6	—
19	United Airlines [South / North American]	2	2.8	2.8	9	5.3	↓
20	American Airlines [South / North American]	2	2.5	2.5	20	2.6	—
21	● Jetstar [Pacific / Oceania]	2	2.4	2.4	24	2.1	—
22	British Airways [European]	2	2.1	2.1	23	2.3	—
23	Ethad Airways	2	1.9	1.9	22	2.5	—
24	Swiss International Airlines	2	1.8	1.8	26	1.7	—
25	Eva Air [Asian]	2	1.7	1.7	33	1.1	—
26	Korean Air [Asian]	2	1.6	1.6	25	1.9	—
27	Asiana Airlines [Asian]	1	1.5	1.5	28	1.5	—
28	Scandinavian Airlines [European]	1	1.4	1.4	37	0.8	—
29	Alitalia [European]	1	1.3	1.3	27	1.6	—
30	● Spring Japan	1	1.3	*	*	*	*
	Malaysia Airlines	1	1.3	1.3	31	1.2	—
32	China Airlines [Asian]	1	1.2	1.2	30	1.4	—
33	Turkish Airlines [Middle East / Africa]	1	1.1	1.1	28	1.5	—
34	Vietnam Airlines [Asian]	1	0.9	0.9	34	0.9	—
35	● Jetstar Asia Airways [Asian]	1	0.8	0.8	35	0.8	—
36	Garuda Indonesia [Asian]	1	0.8	0.8	36	0.8	—
37	● AirAsia X [Asian]	1	0.7	0.7	38	0.7	—
38	Austrian Airlines	1	0.6	0.6	32	1.1	—
39	LOT Polish Airlines [European]	1	0.6	*	*	*	*
40	● Jeju Air [Asian]	1	0.6	0.6	41	0.5	—
41	● Thai AirAsia X	1	0.5	0.5	39	0.7	—
42	Air Tahiti Nui	1	0.5	0.5	40	0.6	—
43	● Scoot	1	0.5	0.5	54	0.2	—
	China Eastern Airlines [Asian]	1	0.5	0.5	43	0.5	—
45	Aeroflot [European]	1	0.5	0.5	47	0.3	—
46	Aero Mexico	1	0.4	0.4	41	0.5	—
	● Tigerair Taiwan [Asian]	1	0.4	0.4	47	0.3	—
48	● Air Busan	1	0.4	0.4	54	0.2	—
49	Philippines Airlines [Asian]	1	0.3	0.3	45	0.3	—
50	● Cebu Pacific Air	1	0.3	0.3	45	0.3	—
	● Hong Kong Express Airways	1	0.3	0.3	51	0.3	—
52	Cathay Dragonair (formerly Hong Kong Dragonair)	1	0.3	0.3	62	0.1	—
	Air China [Asian]	1	0.3	0.3	44	0.4	—
54	Air Calédonie International	1	0.2	0.2	54	0.2	—
	● Spring Airlines	1	0.2	0.2	58	0.2	—
	South African Airways	1	0.2	0.2	53	0.2	—
57	● TWay Airlines	1	0.2	0.2	62	0.1	—
	EgyptAir	1	0.2	0.2	70	0.1	—
59	Air Macau	1	0.2	0.2	58	0.2	—
60	China Southern Airlines	1	0.2	0.2	50	0.3	—
	Aurora Airways (Former Sakhalin Airlines, former Vladivostok Airlines)	1	0.2	0.2	70	0.1	—
62	Uzbekistan Airways	1	0.1	0.1	62	0.1	—
	● Jin Air	1	0.1	0.1	60	0.1	—
	Bangkok Airways	1	0.1	0.1	62	0.1	—
65	Air Niugini	1	0.1	0.1	62	0.1	—
	● Eastar Jet	1	0.1	0.1	73	0.1	—
	SriLankan Airlines	1	0.1	0.1	47	0.3	—
	Hong Kong Airlines	1	0.1	0.1	73	0.1	—
	Ethiopian Airlines	1	0.1	0.1	60	0.1	—
70	S7 Aviation (former Siberian Airlines)	1	0.1	0.1	70	0.1	—
	Iran Air	1	0.1	0.1	73	0.1	—
72	Asian Air	1	0.1	0.1	62	0.1	—
	Hainan Airlines	1	0.1	*	*	*	*
	Juneyao Airlines	1	0.1	0.1	62	0.1	—
75	Shanghai Airlines	1	—	—	82	—	—
	Shenzhen Air	1	—	—	73	0.1	—
	TransAsia Airways	1	—	—	54	0.2	—
	Pakistan International Airlines	1	—	—	73	0.1	—
	Miat Mongolian Airlines	1	—	—	73	0.1	—
80	Asia Atlantic Airlines	1	—	—	82	—	—
	Air Indian	1	—	—	62	0.1	—
	Shandong Airlines	1	—	—	79	—	—
	Jet Asia Airways	1	—	—	79	—	—
	Jet Airways	1	—	—	79	—	—
	Sichuan Air	1	—	—	*	*	*
	Other	1	0.5	0.5	—	—	—
	Don't know	1	7.3	7.3	7.6	—	—

† 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 2016 survey and 2017 survey.

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