

イーロード  
**AB-ROAD**

**2018**

**Airline Satisfaction  
Survey**



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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 2017.

## Respondents

The survey was done on 13,211 respondents selected from the Mighty Monitors of INTAGE Inc. These were Japanese citizens aged 18 years and over who traveled overseas in the year 2017 (the month of departure being in 2017).

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

## Timing

Thu. 12 April through Mon. 16 April, 2018

## Research Method

Internet survey

## Tabulation Numbers

4,000 respondents (respondents contacted: 13,211, samples collected: 5,833s (successful collection rate of 44.2%))

\* 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, Hawaiian Airlines, Asiana Airlines, AirAsia X, Eva Air, Garuda Indonesia, Cathay Pacific Airways, Jetstar Asia Airways, Singapore Airlines, Scoot, Korean Air, Tigerair Taiwan, Thai Airways, Jeju Air, China Airlines, Air China, China Eastern Airlines, Philippines Airlines, Vietnam Airlines, Hong Kong Airlines, Malaysia Airlines, KLM Royal Dutch Airlines, Alitalia, Air France, 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 2017, according to the results of the "2018 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.  
"2017 Airline Satisfaction Survey" - Timing: 14 April through 17 April 2017; Sample size tabulated: 4,000s (100 samples for each airline)
- (3) In this survey, respondents who in 2017 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.

## "2018 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 Mighty Monitors of INTAGE Inc., these were Japanese citizens aged 18 years and over who traveled overseas in the year 2017 (the month of departure being in 2017).

### Timing

Tue. 20 Mar through Mon. 26 Mar, 2018

### Research Method

Internet survey

### Numbers Tabulated

5,016 respondents (respondents contacted: 8,086; samples collected: 5,314 (successful collection rate of :65.7%))

### Method of Tabulation

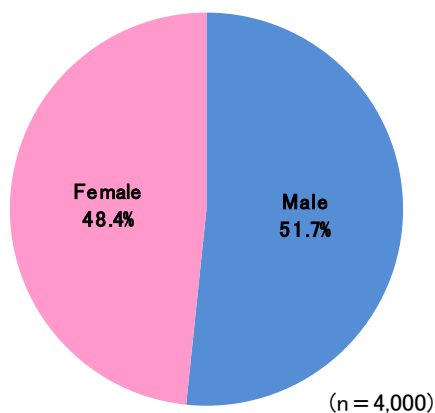
The survey results were weighted to correspond with the breakdown of leisure travelers (by gender and age).

The weightings used are as follows.

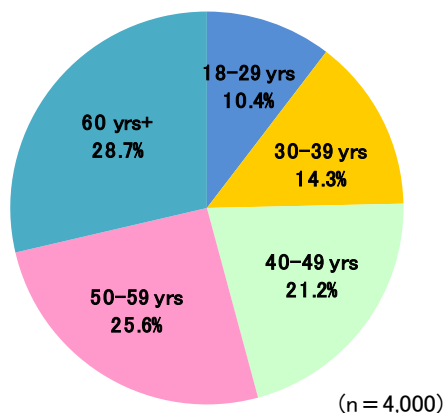
	18-29 yrs	30-39 yrs	40-49 yrs	50-59 yrs	60 yrs+
Male	1.10765974	0.91670177	0.80272950	0.78656379	1.02916549
Female	1.12752382	1.10460628	1.10231553	1.13344618	1.15559906

## 2. Profile of the Respondents

■ Gender (Total / Single Answer)



■ Age (Total / Single Answer)



■ Area of Residence (Total / Single Answer)

	Sample	Hokkaido	Tohoku	Kanto Total	Kita Kanto	4 prefectures	Hokuriku/ Koshinetsu	Chubu/ Tokai	Kansai Total	Keihanshin	Other Kinki	Chugoku	Shikoku	Kyushu/ Okinawa
Total	4,000	2.9	2.8	48.1	3.8	44.3	3.4	10.7	21.7	18.4	3.3	3.6	1.6	5.3

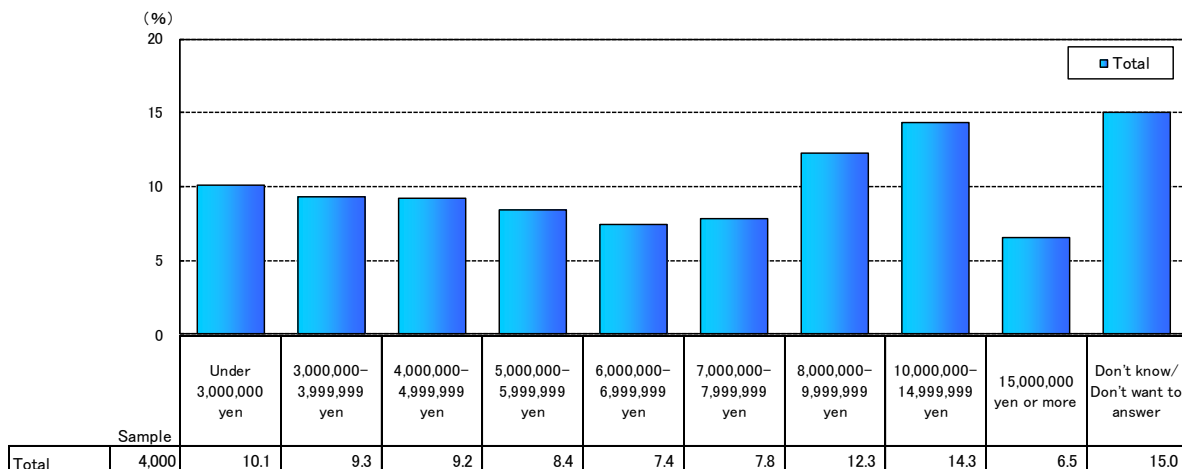
(%)

■ Occupation (Total / Single Answer)

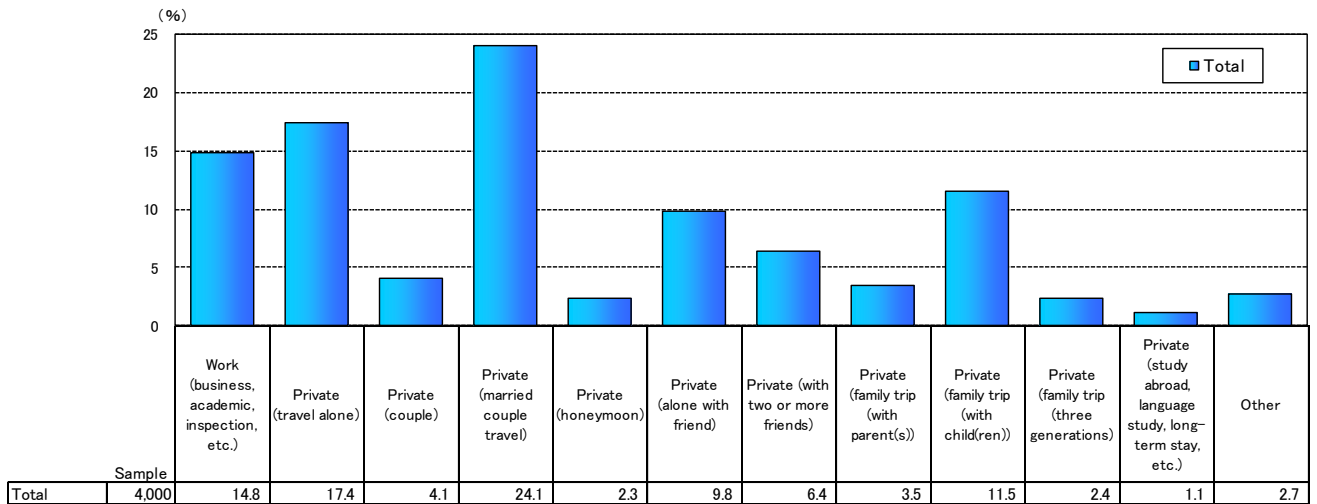
	Sample	Office workers					Civil servants/ Educators	Self-employed	Freelance	Temporary worker/ Contracted employee	Part-timers	Students	Full-time housewives	Unemployed	Other
		Office workers/ General (clerical)	Office workers/ General (research or technical)	Office workers/ General (sales)	Office workers/ General (others)	Office workers/ Manager class, company directors									
Total	4,000	14.3	8.7	4.5	5.2	11.8	5.0	5.8	3.1	3.5	9.2	2.5	14.2	11.5	0.9

(%)

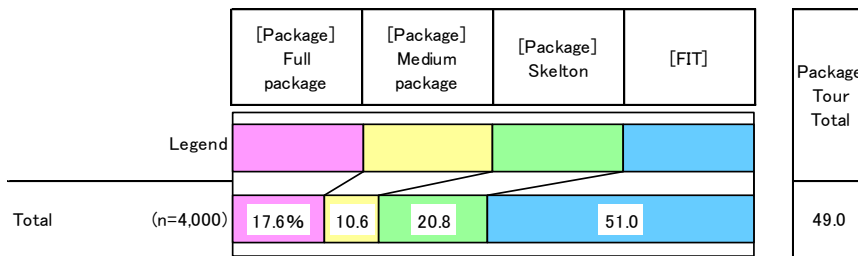
■ Annual Household Income (Total / Single Answer)



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

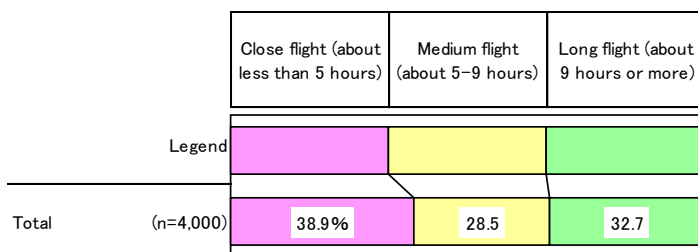


### ■ Overseas Travel Type (Total / Single Answer)

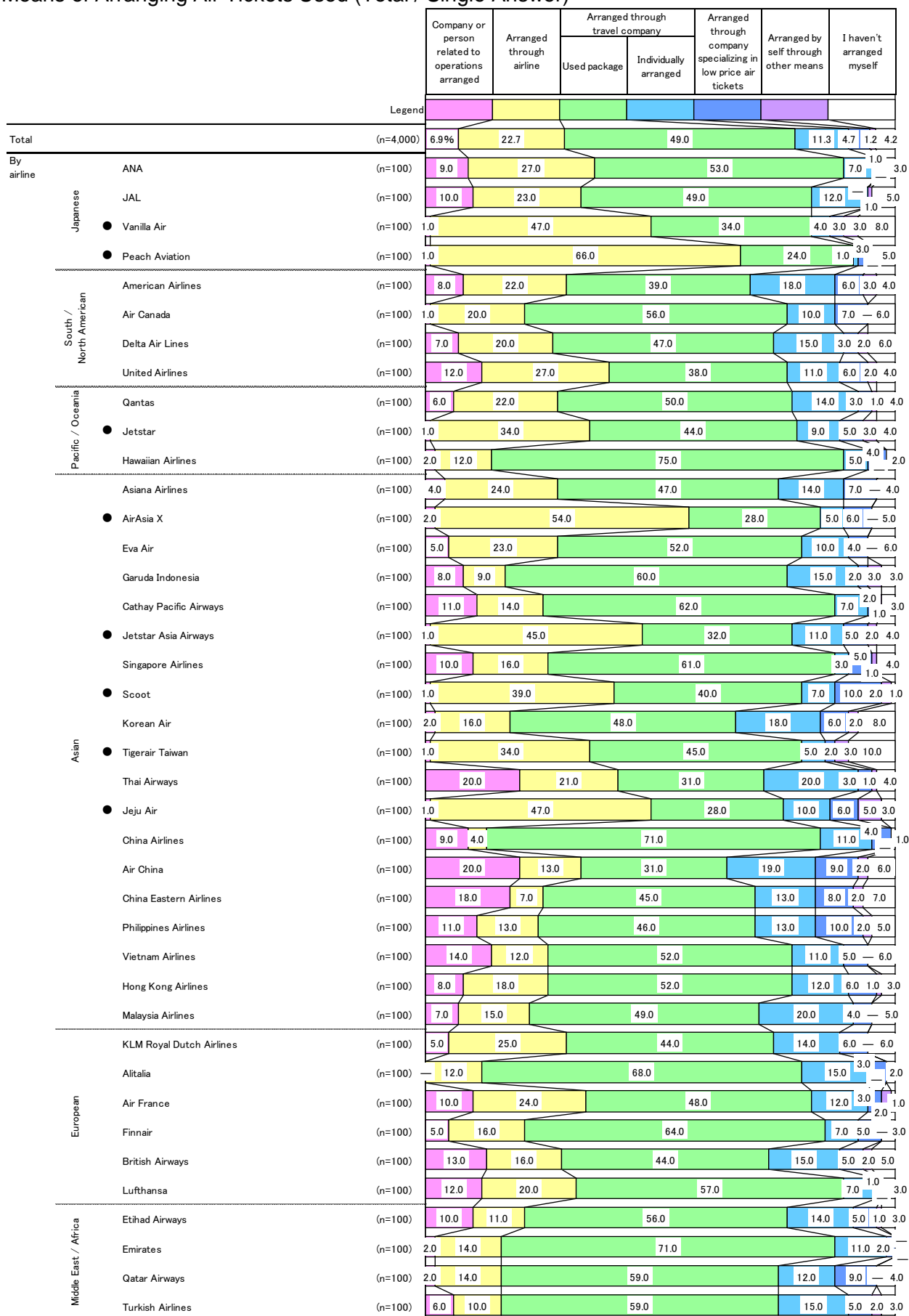


- † [Package] Full package : Tour that is scheduled with sightseeing, activities, and most meals
- [Package] Medium package : Tour that is scheduled with some sightseeing, activities, and meals, as well as tours with some free time
- [Package] Skelton : Tour that basically has free time at destinations,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

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

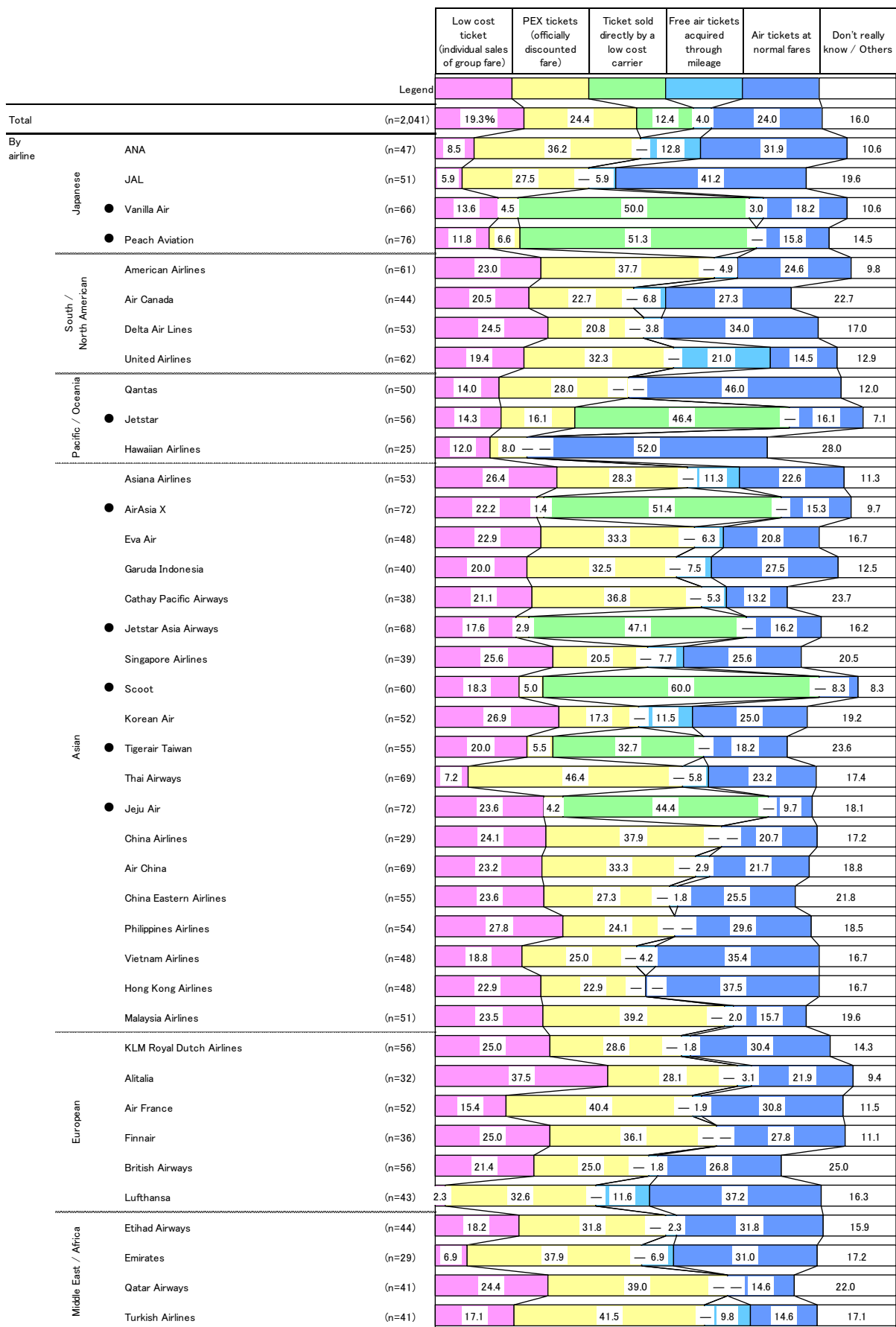


### Means of Arranging Air Tickets Used (Total / Single Answer)



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

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



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

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



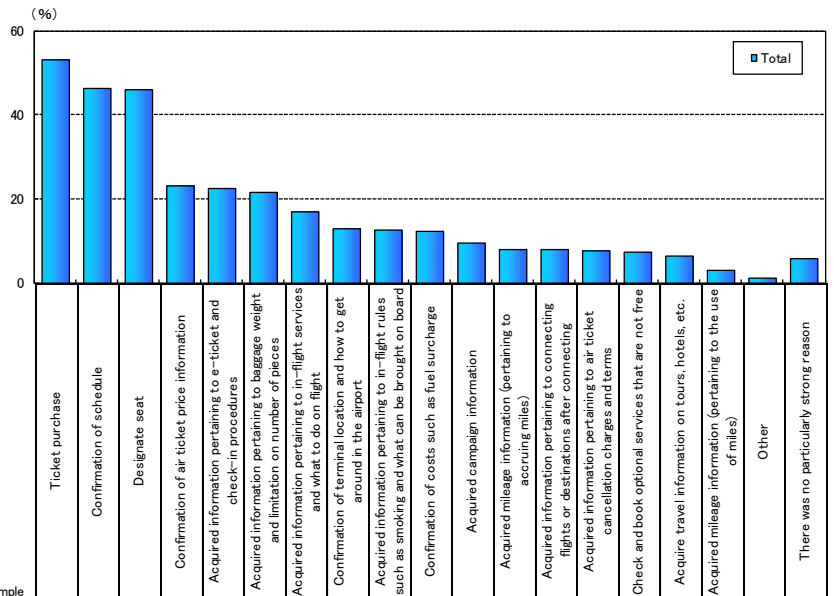
## Whether Airline Website/app Was Used for Overseas Travel (Total / Single Answer)

		Legend		Period used		
		Used	Didn't use	Prior to booking	At time of booking	After booking
Total	(n=4,000)	59.2%	40.9	53.7	48.4	51.9
By airline						
● Peach Aviation [Japanese]	(n=100)	92.0	8.0	92.0	91.0	84.0
● AirAsia X [Asian]	(n=100)	85.0	15.0	84.0	81.0	82.0
● Vanilla Air [Japanese]	(n=100)	82.0	18.0	79.0	77.0	78.0
● Jetstar Asia Airways [Asian]	(n=100)	81.0	19.0	77.0	77.0	74.0
● Scoot [Asian]	(n=100)	75.0	25.0	70.0	71.0	69.0
● Tigerair Taiwan [Asian]	(n=100)	73.0	27.0	65.0	64.0	60.0
● Jetstar [Pacific / Oceania]	(n=100)	73.0	27.0	69.0	65.0	66.0
● Jeju Air [Asian]	(n=100)	72.0	28.0	71.0	69.0	67.0
JAL [Japanese]	(n=100)	72.0	28.0	68.0	62.0	63.0
Qantas [Pacific / Oceania]	(n=100)	67.0	33.0	60.0	53.0	59.0
ANA [Japanese]	(n=100)	67.0	33.0	59.0	52.0	61.0
British Airways [European]	(n=100)	66.0	34.0	55.0	46.0	54.0
Air France [European]	(n=100)	65.0	35.0	58.0	54.0	62.0
Hong Kong Airlines [Asian]	(n=100)	63.0	37.0	59.0	49.0	58.0
KLM Royal Dutch Airlines [European]	(n=100)	63.0	37.0	52.0	45.0	58.0
Asiana Airlines [Asian]	(n=100)	61.0	39.0	57.0	56.0	49.0
American Airlines [South / North American]	(n=100)	61.0	39.0	56.0	53.0	57.0
Etihad Airways [Middle East / Africa]	(n=100)	60.0	40.0	50.0	44.0	56.0
Eva Air [Asian]	(n=100)	59.0	41.0	55.0	47.0	51.0
Turkish Airlines [Middle East / Africa]	(n=100)	58.0	42.0	45.0	37.0	49.0
Thai Airways [Asian]	(n=100)	55.0	45.0	51.0	48.0	49.0
Garuda Indonesia [Asian]	(n=100)	54.0	46.0	46.0	38.0	44.0
Malaysia Airlines [Asian]	(n=100)	54.0	46.0	52.0	41.0	42.0
Qatar Airways [Middle East / Africa]	(n=100)	54.0	46.0	51.0	37.0	45.0
Delta Air Lines [South / North American]	(n=100)	54.0	46.0	45.0	40.0	49.0
United Airlines [South / North American]	(n=100)	54.0	46.0	46.0	42.0	45.0
Air Canada [South / North American]	(n=100)	53.0	47.0	47.0	38.0	44.0
Korean Air [Asian]	(n=100)	52.0	48.0	50.0	48.0	48.0
Philippines Airlines [Asian]	(n=100)	52.0	48.0	48.0	42.0	44.0
Emirates [Middle East / Africa]	(n=100)	52.0	48.0	43.0	34.0	39.0
Alitalia [European]	(n=100)	50.0	50.0	42.0	37.0	42.0
Cathay Pacific Airways [Asian]	(n=100)	47.0	53.0	39.0	31.0	40.0
Singapore Airlines [Asian]	(n=100)	47.0	53.0	46.0	45.0	42.0
Hawaiian Airlines [Pacific / Oceania]	(n=100)	46.0	54.0	43.0	29.0	34.0
Lufthansa [European]	(n=100)	46.0	54.0	41.0	36.0	43.0
Vietnam Airlines [Asian]	(n=100)	45.0	55.0	37.0	33.0	38.0
Finnair [European]	(n=100)	43.0	57.0	36.0	30.0	37.0
Air China [Asian]	(n=100)	42.0	58.0	36.0	35.0	33.0
China Eastern Airlines [Asian]	(n=100)	39.0	61.0	36.0	31.0	28.0
China Airlines [Asian]	(n=100)	32.0	68.0	29.0	25.0	31.0

† If the website/app 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)

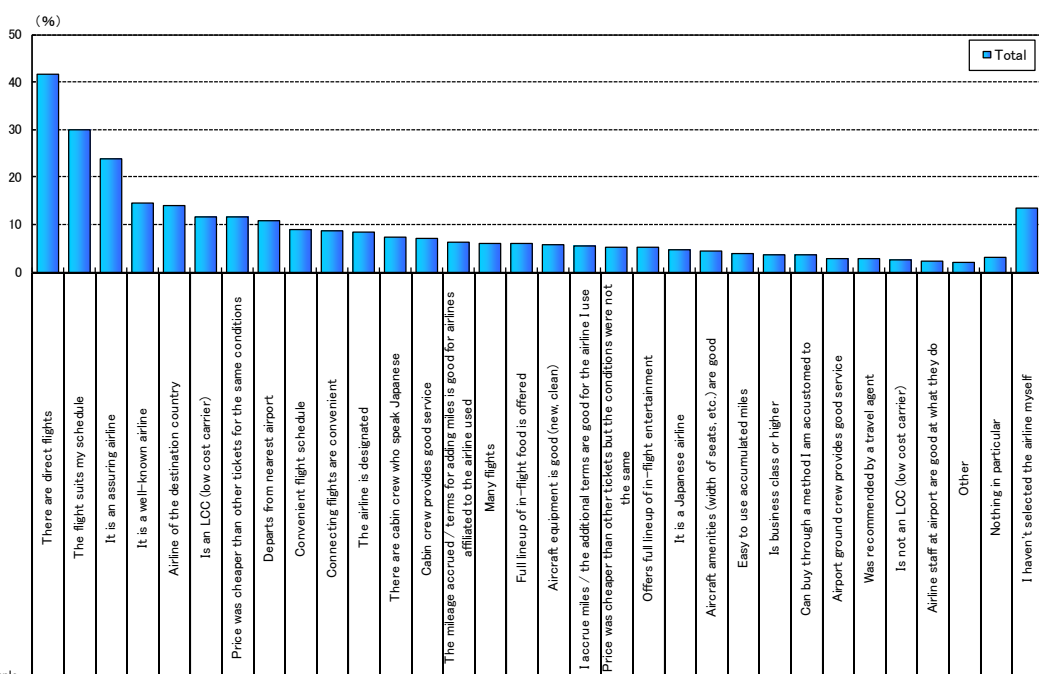
### ■ Purpose for Use of Airline Website/app (Airline website/app user / Multiple Answer)



Sample		Total (n=2,366)																			
		53.2	46.2	46.0	23.0	22.4	21.6	17.0	13.0	12.6	12.3	9.6	8.1	7.9	7.8	7.4	6.5	3.0	1.1	5.8	
By airline	ANA [Japanese]	(n=67)	49.3	56.7	68.7	23.9	23.9	17.9	14.9	13.4	10.4	9.0	11.9	10.4	9.0	7.5	3.0	16.4	4.5	1.5	—
	JAL [Japanese]	(n=72)	55.6	52.8	59.7	26.4	27.8	8.3	19.4	13.9	5.6	15.3	13.9	22.2	6.9	11.1	2.8	15.3	8.3	2.8	6.9
	● Vanilla Air [Japanese]	(n=82)	69.5	58.5	48.8	26.8	23.2	35.4	13.4	22.0	19.5	14.6	8.5	2.4	—	17.1	13.4	7.3	1.2	—	4.9
	● Peach Aviation [Japanese]	(n=92)	85.9	40.2	39.1	33.7	15.2	19.6	6.5	8.7	12.0	15.2	13.0	1.1	1.1	6.5	8.7	2.2	1.1	—	5.4
	American Airlines [South / North American]	(n=61)	59.0	50.8	59.0	21.3	19.7	23.0	24.6	21.3	11.5	11.5	11.5	18.0	16.4	13.1	6.6	3.3	6.6	1.6	6.6
	Air Canada [South / North American]	(n=53)	45.3	50.9	43.4	17.0	20.8	26.4	37.7	18.9	15.1	15.1	7.5	11.3	11.3	1.9	9.4	1.9	3.8	1.9	5.7
	Delta Air Lines [South / North American]	(n=54)	35.2	51.9	51.9	24.1	29.6	14.8	14.8	9.3	11.1	11.1	1.9	18.5	9.3	9.3	1.9	3.7	11.1	5.6	3.7
	United Airlines [South / North American]	(n=54)	40.7	46.3	46.3	18.5	24.1	24.1	16.7	5.6	5.6	9.3	3.7	7.4	3.7	—	—	—	—	—	9.3
	Qantas [Pacific / Oceania]	(n=67)	61.2	41.8	50.7	23.9	26.9	17.9	20.9	9.0	17.9	19.4	10.4	9.0	9.0	11.9	6.0	7.5	3.0	—	1.5
	● Jetstar [Pacific / Oceania]	(n=73)	65.8	50.7	49.3	35.6	28.8	42.5	15.1	21.9	26.0	23.3	8.2	4.1	9.6	8.2	26.0	11.0	1.4	—	1.4
	Hawaiian Airlines [Pacific / Oceania]	(n=46)	37.0	17.4	32.6	8.7	13.0	21.7	28.3	6.5	15.2	4.3	4.3	15.2	—	—	4.3	6.5	2.2	—	15.2
	Asiana Airlines [Asian]	(n=61)	57.4	29.5	37.7	8.2	13.1	8.2	6.6	8.2	4.9	6.6	6.6	6.6	4.9	3.3	1.6	3.3	3.3	1.6	14.8
	● AirAsia X [Asian]	(n=85)	77.6	51.8	42.4	30.6	27.1	25.9	9.4	4.7	9.4	7.1	21.2	1.2	4.7	7.1	17.6	3.5	1.2	1.2	4.7
	Eva Air [Asian]	(n=59)	47.5	42.4	52.5	22.0	18.6	5.1	16.9	6.8	3.4	10.2	6.8	8.5	—	8.5	—	5.1	5.1	—	5.1
	Garuda Indonesia [Asian]	(n=54)	38.9	31.5	38.9	22.2	14.8	11.1	9.3	9.3	5.6	13.0	7.4	3.7	1.9	—	—	13.0	1.9	—	3.7
	Cathay Pacific Airways [Asian]	(n=47)	44.7	40.4	42.6	12.8	19.1	10.6	19.1	4.3	4.3	4.3	4.3	4.3	6.4	—	4.3	2.1	4.3	2.1	10.6
	● Jetstar Asia Airways [Asian]	(n=81)	80.2	54.3	40.7	30.9	22.2	27.2	9.9	13.6	16.0	17.3	19.8	2.5	6.2	13.6	13.6	2.5	—	—	2.5
	Singapore Airlines [Asian]	(n=47)	61.7	44.7	53.2	21.3	25.5	10.6	10.6	10.6	10.6	8.5	19.1	4.3	4.3	4.3	6.4	14.9	8.5	—	4.3
	● Scoot [Asian]	(n=75)	69.3	49.3	34.7	22.7	20.0	32.0	13.3	14.7	17.3	9.3	12.0	4.0	4.0	8.0	22.7	5.3	—	—	2.7
	Korean Air [Asian]	(n=52)	55.8	38.5	38.5	13.5	17.3	11.5	3.8	7.7	9.6	7.7	3.8	7.7	1.9	—	1.9	7.7	3.8	—	7.7
	● Tigerair Taiwan [Asian]	(n=73)	69.9	38.4	32.9	21.9	19.2	27.4	9.6	9.6	19.2	12.3	8.2	1.4	—	6.8	12.3	11.0	—	—	6.8
	Thai Airways [Asian]	(n=55)	54.5	43.6	60.0	27.3	20.0	16.4	12.7	9.1	10.9	5.5	9.1	3.6	7.3	7.3	—	5.5	1.8	—	7.3
	● Jeju Air [Asian]	(n=72)	77.8	43.1	25.0	23.6	23.6	25.0	2.8	4.2	4.2	22.2	19.4	—	—	12.5	4.2	—	—	—	1.4
	China Airlines [Asian]	(n=32)	31.3	34.4	43.8	12.5	15.6	21.9	21.9	9.4	25.0	3.1	6.3	3.1	9.4	9.4	15.6	6.3	—	3.1	6.3
	Air China [Asian]	(n=42)	64.3	35.7	38.1	21.4	14.3	11.9	11.9	19.0	4.8	14.3	7.1	7.1	11.9	7.1	—	9.5	—	2.4	4.8
	China Eastern Airlines [Asian]	(n=39)	33.3	38.5	28.2	20.5	7.7	17.9	10.3	12.8	7.7	5.1	2.6	—	10.3	5.1	—	—	2.6	—	12.8
	Philippines Airlines [Asian]	(n=52)	51.9	42.3	40.4	25.0	11.5	15.4	13.5	11.5	3.8	7.7	5.8	1.9	9.6	1.9	1.9	5.8	1.9	—	9.6
	Vietnam Airlines [Asian]	(n=45)	26.7	40.0	46.7	13.3	31.1	17.8	20.0	20.0	11.1	11.1	13.3	8.9	13.3	2.2	4.4	6.7	2.2	—	2.2
	Hong Kong Airlines [Asian]	(n=63)	49.2	57.1	36.5	33.3	23.8	20.6	20.6	11.1	12.7	14.3	9.5	4.8	1.6	15.9	7.9	9.5	—	1.6	4.8
	Malaysia Airlines [Asian]	(n=54)	38.9	42.6	31.5	16.7	16.7	14.8	14.8	13.0	11.1	13.0	9.3	5.6	9.3	5.6	1.9	9.3	—	—	7.4
	KLM Royal Dutch Airlines [European]	(n=63)	50.8	52.4	66.7	28.6	25.4	23.8	22.2	17.5	19.0	15.9	4.8	9.5	25.4	12.7	9.5	1.6	1.6	1.6	3.2
	Alitalia [European]	(n=50)	40.0	54.0	50.0	18.0	22.0	20.0	20.0	12.0	4.0	8.0	8.0	16.0	8.0	2.0	4.0	14.0	2.0	—	6.0
	Air France [European]	(n=65)	49.2	52.3	44.6	27.7	30.8	16.9	21.5	12.3	21.5	20.0	10.8	13.8	9.2	9.2	6.2	3.1	6.2	3.1	6.2
	Finnair [European]	(n=43)	44.2	34.9	53.5	20.9	16.3	20.9	25.6	11.6	7.0	2.3	2.3	4.7	11.6	—	7.0	4.7	—	—	9.3
	British Airways [European]	(n=66)	37.9	50.0	54.5	16.7	27.3	31.8	21.2	15.2	13.6	13.6	6.1	16.7	9.1	4.5	7.6	4.5	7.6	3.0	10.6
	Lufthansa [European]	(n=46)	37.0	56.5	52.2	19.6	28.3	19.6	23.9	19.6	10.9	8.7	4.3	10.9	15.2	4.3	2.2	4.3	2.2	2.2	—
	Etihad Airways [Middle East / Africa]	(n=60)	43.3	60.0	53.3	25.0	31.7	45.0	33.3	18.3	31.7	13.3	10.0	18.3	16.7	23.3	16.7	16.7	6.7	—	3.3
	Emirates [Middle East / Africa]	(n=52)	26.9	44.2	42.3	25.0	25.0	32.7	32.7	19.2	17.3	17.3	7.7	13.5	17.3	9.6	3.8	—	1.9	1.9	9.6
	Qatar Airways [Middle East / Africa]	(n=54)	33.3	46.3	59.3	22.2	31.5	20.4	29.6	25.9	13.0	18.5	9.3	14.8	18.5	11.1	5.6	13.0	1.9	—	3.7
	Turkish Airlines [Middle East / Africa]	(n=58)	27.6	50.0	50.0	22.4	29.3	20.7	24.1	19.0	12.1	8.6	8.6	13.8	17.2	3.4	3.4	3.4	—	—	6.9

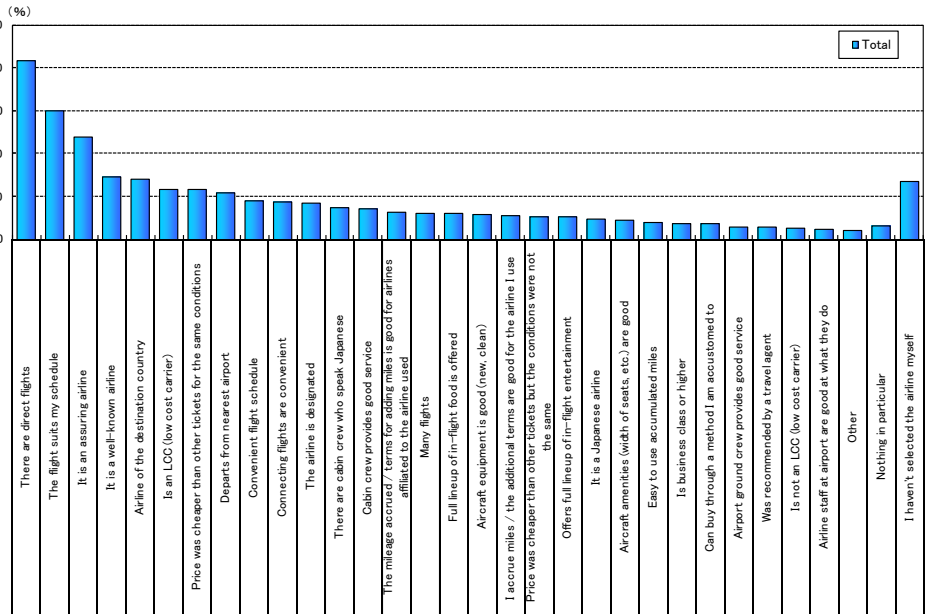
† "●" indicates a low-cost carrier (LCC)

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



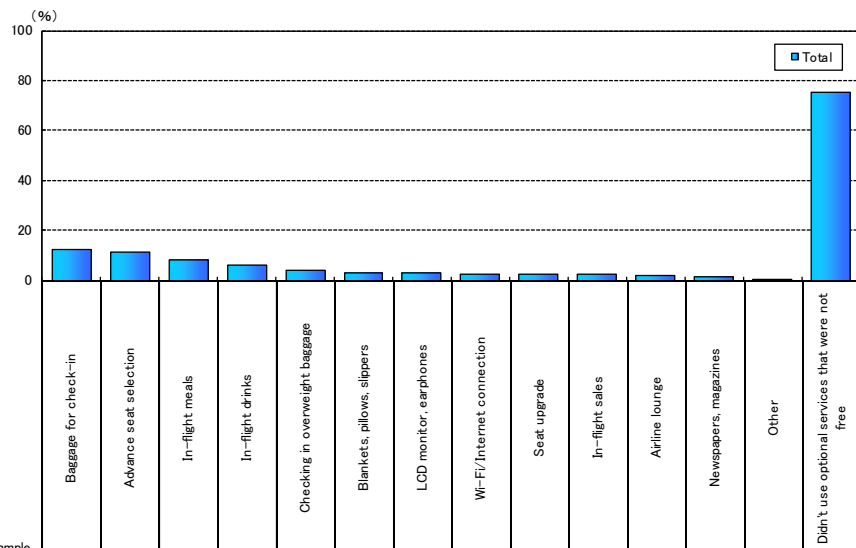
Sample		(n=4,000)	41.6	29.9	23.7	14.6	13.9	11.7	11.7	10.7	8.8	8.7	8.3	7.3	7.1	6.2	6.1	6.0	5.8	5.4	5.3	5.2	4.7	4.4	3.9	3.7	3.7	2.8	2.8	2.5	2.2	2.0	3.0	13.5
Gender	Male	(n=2,066)	41.7	28.5	25.1	16.3	15.4	12.5	12.2	10.1	9.6	9.1	7.3	8.0	8.0	6.7	6.3	6.5	6.7	6.2	5.0	4.9	6.0	4.9	4.5	4.7	3.9	3.0	2.6	2.4	2.5	2.1	3.0	12.4
	Female	(n=1,934)	41.4	31.3	22.2	12.7	12.4	10.9	11.1	11.3	7.9	8.2	9.4	6.5	6.2	5.6	5.9	5.4	4.9	4.4	5.6	5.4	3.4	3.9	3.2	2.6	3.5	2.5	3.0	2.6	1.9	1.9	2.9	14.6
Age	18-29 yrs	(n=415)	42.4	33.7	24.8	16.6	9.2	16.9	15.4	9.2	9.2	7.2	5.5	8.0	7.0	3.9	6.7	5.3	4.6	5.1	6.5	5.3	3.4	3.9	4.1	0.7	1.7	3.9	4.3	2.2	2.7	0.5	3.4	11.6
	30-39 yrs	(n=570)	41.4	34.7	24.7	15.6	10.4	14.2	12.6	10.5	9.1	9.8	5.1	4.2	5.4	4.4	8.4	4.9	4.2	3.9	6.0	4.9	5.4	2.8	3.0	1.4	4.0	1.9	2.8	2.6	1.1	1.1	3.2	11.2
	40-49 yrs	(n=846)	42.0	33.6	23.3	12.8	11.0	12.8	13.2	10.3	9.1	8.0	6.3	6.4	7.3	6.5	7.3	5.8	5.3	5.1	5.7	4.6	4.6	4.3	4.0	3.5	4.0	2.8	1.5	3.1	3.1	2.4	2.4	11.5
	50-59 yrs	(n=1,023)	42.9	30.8	24.8	15.2	16.0	9.6	11.2	10.9	8.7	9.8	7.3	6.8	7.3	8.1	5.5	6.2	6.9	7.4	5.0	5.5	4.5	4.9	4.8	4.7	3.1	2.5	2.6	2.1	2.2	2.3	3.6	10.6
	60 yrs or older	(n=1,146)	39.9	22.5	22.1	14.0	17.7	9.8	9.0	11.3	8.4	8.0	13.4	9.7	7.7	5.8	4.5	6.7	6.4	4.5	4.5	5.3	5.1	5.1	3.3	3.3	5.2	4.5	3.0	3.3	2.5	2.1	2.4	2.7
Area of residence	Kanto	(n=1,924)	41.5	29.9	23.0	14.6	14.3	9.9	12.7	9.8	8.8	8.7	8.9	8.0	8.3	7.5	6.9	6.9	6.3	6.5	5.8	5.5	5.3	4.9	4.9	5.1	4.1	3.5	2.4	2.9	2.9	2.5	3.0	13.7
	Kansai	(n=868)	44.0	30.9	26.7	15.2	14.4	14.7	10.3	11.5	9.8	8.3	8.5	7.5	6.0	5.4	6.6	6.1	6.3	5.0	5.1	5.5	5.6	4.8	4.0	2.3	3.6	2.4	2.6	2.3	1.7	1.3	2.1	12.8
	Tokai	(n=426)	40.8	29.8	20.0	13.1	12.2	12.2	10.1	10.8	9.2	8.9	5.4	4.0	6.1	5.2	4.2	4.5	4.0	3.3	5.9	4.7	1.2	4.5	1.6	3.1	3.3	2.3	1.6	1.4	1.6	1.9	4.7	14.6
Travel type	Package	(n=1,959)	37.3	21.6	23.7	14.7	12.6	7.0	5.2	9.2	6.2	14.5	8.6	7.7	4.4	5.9	6.5	5.4	4.3	2.6	5.6	4.7	4.4	2.3	3.5	1.4	3.1	4.6	2.4	2.5	1.5	2.8	22.4	
	Full package	(n=703)	24.8	10.4	23.5	12.8	10.7	2.8	1.1	5.1	2.3	4.4	19.5	6.7	6.7	4.4	5.3	6.0	4.7	2.8	1.1	4.6	4.3	3.1	1.8	4.1	0.3	2.0	5.0	1.8	1.7	1.6	2.7	34.6
	Medium package	(n=425)	36.2	22.6	25.6	16.9	12.9	7.5	3.8	11.3	7.3	7.3	16.5	12.2	8.9	5.2	6.1	7.5	5.9	5.2	1.9	5.2	5.6	4.7	2.8	2.1	1.2	3.3	5.9	2.1	2.8	2.1	3.3	20.9
	Skeleton	(n=831)	48.4	30.6	23.0	15.0	14.0	10.2	9.3	11.7	9.0	7.2	9.4	8.4	7.8	4.0	6.3	6.5	5.8	5.2	4.2	6.6	4.6	5.3	2.5	3.6	2.4	3.9	3.7	3.0	2.9	1.1	2.6	12.9
FIT	(n=2,041)	45.7	37.8	23.7	14.5	15.2	16.3	17.9	12.0	11.3	11.0	2.4	6.0	6.6	7.8	6.4	5.4	6.2	6.3	7.9	4.8	4.8	4.5	5.3	4.0	5.9	2.5	1.0	2.6	2.0	2.5	3.2	4.9	
Accompanying traveler	Travel alone	(n=695)	41.2	35.4	23.2	13.4	11.4	17.8	18.4	12.5	11.7	12.8	4.5	6.5	6.9	8.5	7.2	6.6	5.6	6.0	9.1	4.7	4.3	4.7	5.2	4.2	8.3	2.4	0.9	4.0	2.2	2.3	2.9	8.1
	With spouse/partner/on honeymoon	(n=1,220)	39.9	26.1	25.1	15.3	15.3	9.6	10.0	10.2	8.9	7.6	11.8	8.0	7.6	5.2	5.4	7.1	7.2	6.0	4.3	6.2	4.9	4.9	4.3	4.9	3.0	3.2	3.4	2.4	2.5	1.7	2.4	15.4
	With friend	(n=648)	43.4	29.9	21.0	14.0	12.7	17.1	11.3	10.8	6.9	5.9	8.3	6.3	6.3	4.6	6.0	2.8	4.8	2.9	4.8	4.2	4.3	2.6	1.9	1.7	2.0	1.9	3.5	1.1	1.7	2.5	3.4	13.3
	Family travel	(n=695)	44.6	28.2	25.2	16.3	13.2	11.4	10.4	12.2	8.1	7.5	8.9	8.2	7.8	3.7	5.6	6.8	4.6	4.5	4.3	5.2	5.8	5.2	3.2	2.9	3.7	3.0	3.6	2.7	1.9	1.9	3.0	14.5
Travel class	Is business class or higher	(n=458)	38.9	29.7	34.7	23.1	19.2	4.1	9.8	7.6	10.5	14.6	9.0	9.6	15.7	14.2	8.7	14.2	11.4	12.0	5.0	8.5	7.2	12.9	9.2	31.4	4.6	8.3	0.9	3.9	7.0	2.6	2.2	6.3
	Economy class	(n=3,542)	41.9	29.9	22.3	13.5	13.2	12.7	11.9	11.0	8.6	7.9	8.2	7.0	6.0	5.1	5.8	4.9	5.1	4.5	5.3	4.7	4.4	3.3	3.2	0.1	3.6	2.1	3.0	2.3	1.6	1.9	3.1	14.4

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



Sample		Total																																		
Total (n=4,000)		41.6	29.9	23.7	14.6	13.9	11.7	11.7	10.7	8.8	8.7	8.3	7.3	7.1	6.2	6.1	6.0	5.8	5.4	5.3	5.2	4.7	4.4	3.9	3.7	3.7	2.8	2.8	2.5	2.2	2.0	3.0	13.5			
By airline	ANA [Japanese] (n=100)	41.0	23.0	69.0	22.0	3.0	—	2.0	8.0	8.0	8.0	9.0	16.0	20.0	5.0	5.0	13.0	9.0	20.0	10.0	10.0	37.0	10.0	16.0	11.0	3.0	8.0	3.0	2.0	10.0	—	—	11.0			
	JAL [Japanese] (n=100)	54.0	23.0	60.0	27.0	1.0	3.0	1.0	7.0	11.0	2.0	12.0	27.0	20.0	3.0	7.0	11.0	11.0	27.0	2.0	13.0	45.0	15.0	17.0	6.0	8.0	10.0	2.0	5.0	9.0	—	—	6.0			
	● Vanilla Air [Japanese] (n=100)	51.0	37.0	20.0	8.0	1.0	60.0	20.0	8.0	12.0	—	2.0	14.0	2.0	2.0	7.0	1.0	4.0	1.0	10.0	1.0	25.0	1.0	2.0	—	4.0	—	—	—	—	1.0	1.0	3.0	6.0		
	● Peach Aviation [Japanese] (n=100)	46.0	29.0	12.0	10.0	1.0	61.0	16.0	18.0	12.0	2.0	2.0	11.0	2.0	—	10.0	—	1.0	—	11.0	—	21.0	1.0	—	—	10.0	1.0	—	—	—	—	1.0	1.0	5.0		
	American Airlines [South / North American] (n=100)	29.0	31.0	22.0	22.0	24.0	2.0	12.0	8.0	7.0	19.0	7.0	2.0	5.0	11.0	8.0	2.0	9.0	5.0	6.0	4.0	4.0	1.0	5.0	7.0	3.0	1.0	1.0	3.0	3.0	1.0	6.0	13.0			
	Air Canada [South / North American] (n=100)	35.0	21.0	29.0	16.0	17.0	2.0	10.0	7.0	7.0	8.0	11.0	8.0	4.0	12.0	5.0	3.0	4.0	5.0	5.0	7.0	1.0	4.0	4.0	3.0	4.0	1.0	2.0	4.0	1.0	3.0	—	20.0			
	Delta Air Lines [South / North American] (n=100)	50.0	31.0	17.0	13.0	12.0	1.0	8.0	10.0	10.0	6.0	11.0	2.0	4.0	1.0	7.0	4.0	4.0	11.0	4.0	5.0	—	5.0	9.0	4.0	2.0	2.0	1.0	2.0	4.0	1.0	14.0				
	United Airlines [South / North American] (n=100)	38.0	33.0	15.0	17.0	13.0	—	7.0	3.0	9.0	6.0	6.0	4.0	1.0	14.0	9.0	2.0	3.0	12.0	1.0	5.0	—	—	13.0	3.0	3.0	—	1.0	3.0	—	1.0	5.0	13.0			
	Qantas [Pacific / Oceania] (n=100)	47.0	32.0	43.0	26.0	37.0	2.0	3.0	7.0	10.0	8.0	8.0	2.0	7.0	6.0	9.0	6.0	3.0	8.0	5.0	6.0	4.0	3.0	3.0	1.0	—	3.0	5.0	4.0	5.0	3.0	9.0				
	● Jetstar [Pacific / Oceania] (n=100)	57.0	34.0	20.0	15.0	11.0	36.0	19.0	14.0	9.0	5.0	5.0	9.0	3.0	—	8.0	1.0	1.0	2.0	6.0	1.0	2.0	1.0	—	2.0	5.0	3.0	2.0	2.0	2.0	3.0	1.0	7.0			
	Hawaiian Airlines [Pacific / Oceania] (n=100)	56.0	31.0	23.0	11.0	16.0	2.0	8.0	14.0	6.0	2.0	10.0	12.0	4.0	—	4.0	6.0	1.0	2.0	5.0	5.0	2.0	3.0	2.0	2.0	—	2.0	3.0	10.0	3.0	1.0	3.0	16.0			
	Asiana Airlines [Asian] (n=100)	45.0	39.0	22.0	17.0	21.0	4.0	10.0	13.0	12.0	5.0	10.0	5.0	6.0	5.0	11.0	5.0	4.0	5.0	2.0	3.0	3.0	1.0	4.0	2.0	6.0	2.0	2.0	—	2.0	2.0	7.0	6.0			
	● AirAsia X [Asian] (n=100)	47.0	35.0	12.0	12.0	5.0	46.0	25.0	11.0	8.0	12.0	5.0	3.0	1.0	—	6.0	1.0	1.0	12.0	—	2.0	—	—	3.0	6.0	1.0	1.0	—	—	—	1.0	5.0	7.0			
	Eva Air [Asian] (n=100)	57.0	36.0	26.0	15.0	20.0	2.0	9.0	18.0	13.0	1.0	8.0	12.0	9.0	11.0	3.0	6.0	5.0	4.0	6.0	4.0	1.0	3.0	—	2.0	3.0	2.0	2.0	—	2.0	2.0	10.0				
	Garuda Indonesia [Asian] (n=100)	68.0	27.0	21.0	9.0	30.0	—	2.0	7.0	7.0	4.0	5.0	7.0	7.0	5.0	1.0	4.0	6.0	3.0	1.0	5.0	1.0	5.0	1.0	8.0	1.0	3.0	1.0	4.0	1.0	—	5.0	7.0			
	Cathay Pacific Airways [Asian] (n=100)	39.0	28.0	28.0	17.0	7.0	2.0	8.0	13.0	14.0	2.0	11.0	8.0	6.0	5.0	7.0	7.0	4.0	2.0	4.0	4.0	—	2.0	4.0	2.0	3.0	—	3.0	2.0	—	4.0	4.0	15.0			
	● Jetstar Asia Airways [Asian] (n=100)	51.0	38.0	10.0	12.0	7.0	55.0	22.0	20.0	17.0	6.0	5.0	5.0	2.0	3.0	6.0	1.0	4.0	4.0	11.0	—	4.0	2.0	2.0	1.0	12.0	1.0	2.0	—	1.0	—	2.0	10.0			
	Singapore Airlines [Asian] (n=100)	47.0	25.0	42.0	39.0	16.0	3.0	5.0	9.0	8.0	10.0	11.0	21.0	5.0	5.0	9.0	9.0	8.0	1.0	7.0	1.0	7.0	3.0	2.0	1.0	5.0	4.0	2.0	2.0	—	1.0	9.0				
	● Scoot [Asian] (n=100)	47.0	26.0	11.0	4.0	4.0	55.0	25.0	9.0	6.0	3.0	3.0	9.0	3.0	1.0	3.0	2.0	11.0	2.0	11.0	1.0	2.0	4.0	3.0	5.0	6.0	2.0	—	2.0	4.0	5.0	—	9.0			
	Korean Air [Asian] (n=100)	39.0	30.0	15.0	14.0	18.0	1.0	11.0	14.0	4.0	5.0	6.0	6.0	2.0	6.0	5.0	6.0	2.0	4.0	2.0	2.0	—	4.0	2.0	1.0	5.0	2.0	—	2.0	6.0	15.0					
	● Tigerair Taiwan [Asian] (n=100)	48.0	33.0	9.0	2.0	10.0	42.0	17.0	16.0	7.0	3.0	2.0	6.0	3.0	—	5.0	—	3.0	—	5.0	—	1.0	1.0	—	3.0	1.0	—	3.0	1.0	—	1.0	—	5.0	11.0		
	Thai Airways [Asian] (n=100)	57.0	38.0	27.0	13.0	25.0	—	10.0	9.0	16.0	10.0	1.0	4.0	6.0	7.0	9.0	7.0	5.0	3.0	1.0	3.0	1.0	1.0	3.0	4.0	3.0	1.0	3.0	6.0	—	2.0	4.0	13.0			
	● Jeju Air [Asian] (n=100)	51.0	39.0	10.0	5.0	12.0	39.0	26.0	18.0	7.0	1.0	4.0	5.0	—	1.0	—	2.0	1.0	1.0	10.0	1.0	—	—	—	9.0	1.0	1.0	1.0	1.0	1.0	5.0	3.0	6.0			
	China Airlines [Asian] (n=100)	46.0	27.0	10.0	7.0	12.0	4.0	14.0	16.0	9.0	7.0	8.0	12.0	2.0	3.0	2.0	2.0	—	5.0	1.0	—	1.0	—	2.0	2.0	—	7.0	5.0	—	1.0	2.0	20.0				
	Air China [Asian] (n=100)	32.0	28.0	6.0	3.0	11.0	3.0	16.0	8.0	6.0	6.0	7.0	1.0	2.0	9.0	7.0	1.0	2.0	6.0	5.0	1.0	1.0	2.0	4.0	4.0	3.0	1.0	3.0	7.0	—	5.0	6.0	17.0			
	China Eastern Airlines [Asian] (n=100)	38.0	26.0	8.0	5.0	12.0	8.0	12.0	10.0	5.0	6.0	12.0	1.0	2.0	2.0	6.0	1.0	—	5.0	8.0	—	2.0	1.0	—	2.0	3.0	5.0	2.0	1.0	3.0	4.0	21.0				
	Philippines Airlines [Asian] (n=100)	61.0	34.0	11.0	5.0	19.0	—	9.0	15.0	10.0	6.0	4.0	8.0	3.0	4.0	7.0	2.0	6.0	—	2.0	2.0	3.0	—	1.0	1.0	7.0	—	3.0	3.0	—	1.0	3.0	9.0			
	Vietnam Airlines [Asian] (n=100)	43.0	19.0	9.0	—	16.0	1.0	7.0	16.0	5.0	8.0	8.0	5.0	3.0	4.0	1.0	—	9.0	2.0	5.0	3.0	2.0	3.0	2.0	2.0	1.0	—	3.0	3.0	1.0	1.0	5.0	23.0			
	Hong Kong Airlines [Asian] (n=100)	48.0	32.0	15.0	3.0	9.0	19.0	16.0	12.0	7.0	4.0	7.0	5.0	8.0	3.0	7.0	5.0	4.0	5.0	5.0	5.0	—	6.0	1.0	2.0	1.0	3.0	2.0	4.0	5.0	2.0	5.0	17.0			
	Malaysia Airlines [Asian] (n=100)	40.0	30.0	19.0	10.0	18.0	5.0	17.0	5.0	11.0	8.0	11.0	6.0	7.0	9.0	5.0	3.0	6.0	6.0	1.0	3.0	5.0	1.0	3.0	3.0	4.0	1.0	2.0	1.0	1.0	5.0	14.0				
	KLM Royal Dutch Airlines [European] (n=100)	21.0	34.0	36.0	20.0	11.0	1.0	11.0	6.0	11.0	21.0	13.0	10.0	8.0	6.0	8.0	7.0	4.0	8.0	3.0	10.0	—	5.0	6.0	3.0	3.0	4.0	4.0	4.0	2.0	1.0	3.0	15.0			
	Alitalia [European] (n=100)	49.0	20.0	8.0	15.0	24.0	1.0	4.0	8.0	4.0	7.0	12.0	5.0	4.0	3.0	5.0	7.0	1.0	4.0	4.0	4.0	1.0	2.0	3.0	3.0	2.0	1.0	4.0	3.0	—	2.0	2.0	18.0			
	Air France [European] (n=100)	44.0	31.0	39.0	30.0	23.0	—	3.0	5.0	7.0	15.0	6.0	6.0	15.0	4.0	19.0	11.0	9.0	4.0	3.0	11.0	2.0	7.0	4.0	6.0	2.0	4.0	5.0	2.0	5.0	5.0	12.0				
	Finnair [European] (n=100)	21.0	34.0	35.0	7.0	9.0	—	10.0	16.0	8.0	22.0	14.0	6.0	5.0	7.0	—	2.0	4.0	3.0	3.0	1.0	4.0	2.0	5.0	4.0	1.0	1.0	—	2.0	3.0	2.0	21.0				
	British Airways [European] (n=100)	52.0	24.0	28.0	30.0	22.0	1.0	11.0	11.0	8.0	10.0	9.0	7.0	9.0	16.0	11.0	9.0	9.0	7.0	3.0	8.0	2.0	7.0	8.0	4.0	3.0	6.0	4.0	1.0	5.0	1.0	4.0	15.0			
Lufthansa [European] (n=100)	24.0	26.0	46.0	31.0	19.0	1.0	3.0	13.0	7.0	26.0	15.0	16.0	19.0	16.0	11.0	10.0	11.0	7.0	3.0	9.0	2.0	10.0	4.0	12.0	1.0	6.0	2.0	2.0	3.0	6.0	1.0	20.0				
Etihad Airways [Middle East / Africa] (n=100)	17.0	30.0	31.0	22.0	16.0	5.0	15.0	8.0	8.0	19.0	9.0	6.0	11.0	14.0	8.0	15.0	15.0	7.0	13.0	9.0	7.0	12.0	5.0	6.0	5.0	7.0	3.0	5.0	7.0	3.0	2.0	19.0				
Emirates [Middle East / Africa] (n=100)	9.0	28.0	43.0	29.0	8.0	—	14.0	5.0	7.0	25.0	15.0	8.0	23.0	10.0	5.0	22.0	22.0	5.0	4.0	25.0	1.0	17.0	4.0	10.0	2.0	7.0	5.0	4.0	3.0	1.0	1.0	15.0				
Qatar Airways [Middle East / Africa] (n=100)	2.0	27.0	22.0	9.0	6.0	1.0	17																													

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



Sample		(%)														
Total (n=4,000)		12.2	11.6	8.4	6.4	3.9	3.1	3.0	2.5	2.3	2.3	1.8	1.7	0.2	75.1	
By airline	ANA [Japanese]	(n=100)	9.0	8.0	7.0	7.0	2.0	6.0	1.0	2.0	4.0	7.0	6.0	3.0	—	75.0
	JAL [Japanese]	(n=100)	9.0	10.0	6.0	6.0	3.0	4.0	8.0	5.0	—	4.0	1.0	1.0	—	83.0
	● Vanilla Air [Japanese]	(n=100)	21.0	35.0	17.0	16.0	9.0	3.0	1.0	2.0	7.0	4.0	1.0	1.0	—	40.0
	● Peach Aviation [Japanese]	(n=100)	28.0	31.0	3.0	4.0	15.0	1.0	1.0	4.0	2.0	1.0	—	—	—	44.0
	American Airlines [South / North American]	(n=100)	16.0	16.0	10.0	6.0	5.0	4.0	5.0	5.0	3.0	2.0	2.0	2.0	—	76.0
	Air Canada [South / North American]	(n=100)	4.0	2.0	4.0	5.0	—	1.0	1.0	3.0	3.0	1.0	—	1.0	—	86.0
	Delta Air Lines [South / North American]	(n=100)	7.0	11.0	8.0	4.0	2.0	5.0	5.0	2.0	2.0	—	2.0	—	—	80.0
	United Airlines [South / North American]	(n=100)	2.0	4.0	3.0	4.0	1.0	—	1.0	—	1.0	—	1.0	—	—	90.0
	Qantas [Pacific / Oceania]	(n=100)	15.0	20.0	15.0	13.0	9.0	6.0	9.0	5.0	5.0	6.0	4.0	6.0	—	66.0
	● Jetstar [Pacific / Oceania]	(n=100)	37.0	22.0	24.0	15.0	19.0	16.0	12.0	5.0	5.0	4.0	1.0	2.0	—	36.0
	Hawaiian Airlines [Pacific / Oceania]	(n=100)	7.0	8.0	6.0	2.0	1.0	2.0	2.0	4.0	6.0	2.0	2.0	3.0	—	83.0
	Asiana Airlines [Asian]	(n=100)	11.0	11.0	10.0	6.0	1.0	4.0	5.0	2.0	2.0	1.0	3.0	2.0	—	76.0
	● AirAsia X [Asian]	(n=100)	39.0	29.0	32.0	14.0	10.0	5.0	—	—	2.0	—	1.0	—	—	33.0
	Eva Air [Asian]	(n=100)	6.0	6.0	5.0	3.0	—	1.0	3.0	—	—	—	1.0	1.0	—	93.0
	Garuda Indonesia [Asian]	(n=100)	8.0	6.0	2.0	1.0	1.0	2.0	—	1.0	—	1.0	1.0	—	—	91.0
	Cathay Pacific Airways [Asian]	(n=100)	7.0	7.0	4.0	5.0	2.0	2.0	3.0	—	—	—	2.0	—	—	88.0
	● Jetstar Asia Airways [Asian]	(n=100)	29.0	31.0	12.0	9.0	20.0	1.0	2.0	3.0	3.0	4.0	—	2.0	—	43.0
	Singapore Airlines [Asian]	(n=100)	12.0	8.0	8.0	6.0	2.0	2.0	3.0	2.0	1.0	2.0	1.0	—	—	81.0
	● Scoot [Asian]	(n=100)	26.0	23.0	19.0	14.0	7.0	4.0	3.0	4.0	3.0	4.0	1.0	—	—	51.0
	Korean Air [Asian]	(n=100)	7.0	5.0	5.0	4.0	—	4.0	1.0	1.0	1.0	5.0	5.0	3.0	—	86.0
	● Tigerair Taiwan [Asian]	(n=100)	21.0	17.0	13.0	7.0	10.0	1.0	1.0	1.0	1.0	—	1.0	—	—	58.0
	Thai Airways [Asian]	(n=100)	8.0	8.0	7.0	7.0	—	4.0	5.0	2.0	—	—	1.0	3.0	—	89.0
	● Jeju Air [Asian]	(n=100)	12.0	9.0	3.0	2.0	3.0	—	—	—	—	2.0	1.0	—	—	76.0
	China Airlines [Asian]	(n=100)	7.0	3.0	5.0	4.0	1.0	2.0	1.0	—	—	1.0	—	2.0	—	90.0
	Air China [Asian]	(n=100)	8.0	5.0	5.0	3.0	1.0	3.0	—	2.0	—	1.0	—	1.0	2.0	88.0
	China Eastern Airlines [Asian]	(n=100)	8.0	2.0	4.0	4.0	1.0	—	2.0	—	—	—	—	1.0	1.0	90.0
	Philippines Airlines [Asian]	(n=100)	17.0	12.0	11.0	6.0	2.0	4.0	4.0	5.0	4.0	4.0	2.0	4.0	—	70.0
	Vietnam Airlines [Asian]	(n=100)	6.0	3.0	4.0	3.0	3.0	3.0	3.0	1.0	1.0	3.0	—	1.0	—	88.0
	Hong Kong Airlines [Asian]	(n=100)	16.0	17.0	12.0	10.0	2.0	3.0	2.0	2.0	2.0	—	3.0	1.0	—	68.0
	Malaysia Airlines [Asian]	(n=100)	12.0	7.0	8.0	5.0	1.0	3.0	4.0	5.0	—	3.0	2.0	2.0	—	79.0
	KLM Royal Dutch Airlines [European]	(n=100)	9.0	13.0	5.0	4.0	1.0	1.0	2.0	1.0	5.0	2.0	—	—	1.0	77.0
	Alitalia [European]	(n=100)	6.0	3.0	3.0	5.0	1.0	2.0	3.0	1.0	1.0	—	—	1.0	—	86.0
	Air France [European]	(n=100)	9.0	12.0	10.0	11.0	5.0	5.0	5.0	7.0	6.0	3.0	3.0	6.0	—	69.0
	Finnair [European]	(n=100)	8.0	10.0	2.0	4.0	1.0	1.0	3.0	1.0	3.0	—	3.0	2.0	—	81.0
	British Airways [European]	(n=100)	6.0	11.0	9.0	10.0	3.0	3.0	5.0	3.0	1.0	7.0	3.0	3.0	—	77.0
	Lufthansa [European]	(n=100)	3.0	7.0	5.0	4.0	1.0	3.0	2.0	2.0	2.0	3.0	1.0	2.0	—	84.0
	Ethiad Airways [Middle East / Africa]	(n=100)	14.0	15.0	17.0	13.0	8.0	7.0	7.0	11.0	13.0	8.0	10.0	5.0	—	71.0
	Emirates [Middle East / Africa]	(n=100)	6.0	6.0	4.0	3.0	—	2.0	—	3.0	1.0	3.0	2.0	2.0	—	86.0
	Qatar Airways [Middle East / Africa]	(n=100)	5.0	4.0	6.0	4.0	1.0	1.0	1.0	1.0	1.0	3.0	4.0	—	1.0	86.0
	Turkish Airlines [Middle East / Africa]	(n=100)	7.0	8.0	3.0	2.0	2.0	3.0	3.0	3.0	2.0	1.0	2.0	3.0	1.0	89.0

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

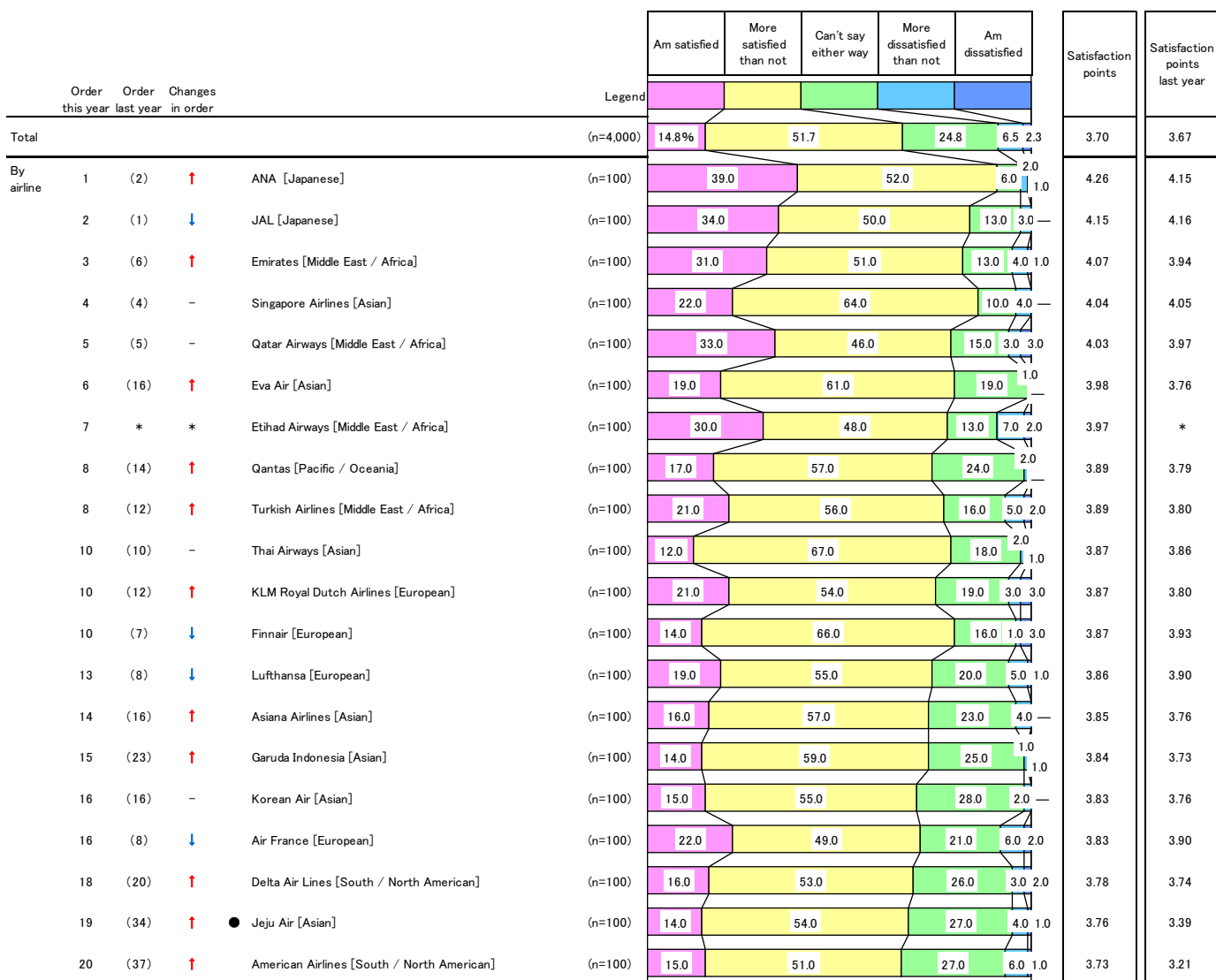
## **Part 2: Airline Evaluations**



# 1. Overall Satisfaction: Top 20

- The overall satisfaction score total average was 3.70 points.
- There was a switch in the top2 from last year, with ANA on top (4.26 points) and JAL in 2nd place (4.15 points) this time. This was followed by the ascendant Emirates (4.07 points).
- Eva Air (3.98 points) went from 16th place last year to 6th place. Jeju Air (3.76 points) went from 34th place last year to 19th place, while American Airlines (3.73 points) rose sharply in ranking from 37th place last year to 20th place.

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



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

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

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

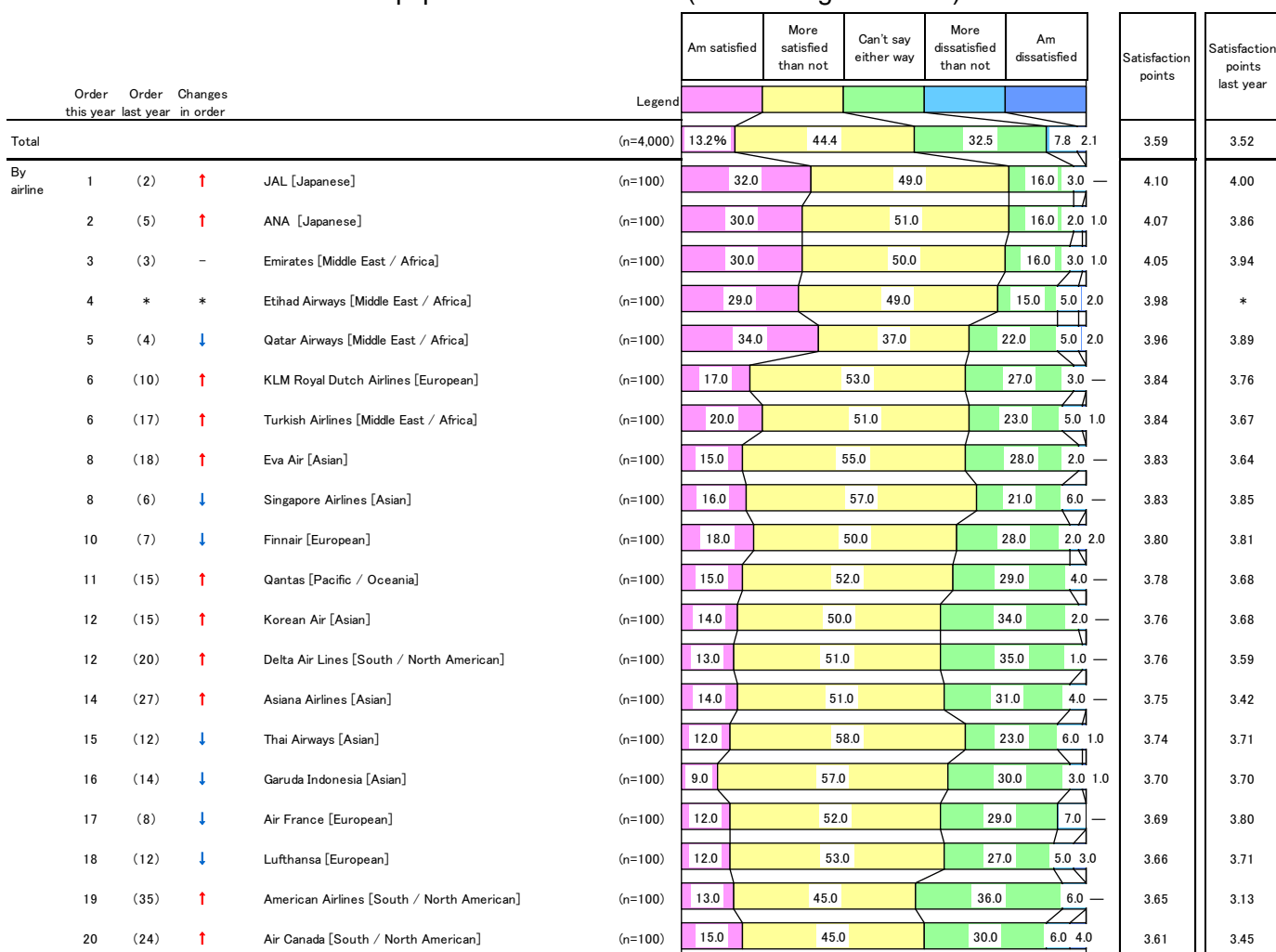
† "●" indicates a low-cost carrier (LCC)

## 2. Satisfaction by Attribute

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

- The total average satisfaction score for “Airline equipment, facilities” was 3.59 points.
- JAL’s score of 4.10 points / moved it from 2nd place last year to the top spot. 2nd place ANA (4.07 points) raised its ranking to 5th place, which resulted in the two Japanese companies having adjacent ranking. This was followed by the ascendant Emirates (4.05 points).
- Asiana Airlines (3.75 points) saw a huge increase from 27th place last year to 14th place, as did American Airlines (3.65 points), moving from 35th place last year to 19th place.
- Among the reasons for satisfaction and reasons for dissatisfaction, “Newness/cleanness of plane” and “Width/comfort of seats” were ranked at the top.

#### ■ 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.

† 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	2,303	35.9	36.8	25.3	7.9	18.8	11.3	1.7	22.9
Reasons for dissatisfaction	1,697	14.8	29.3	7.5	8.6	12.1	9.3	1.6	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."

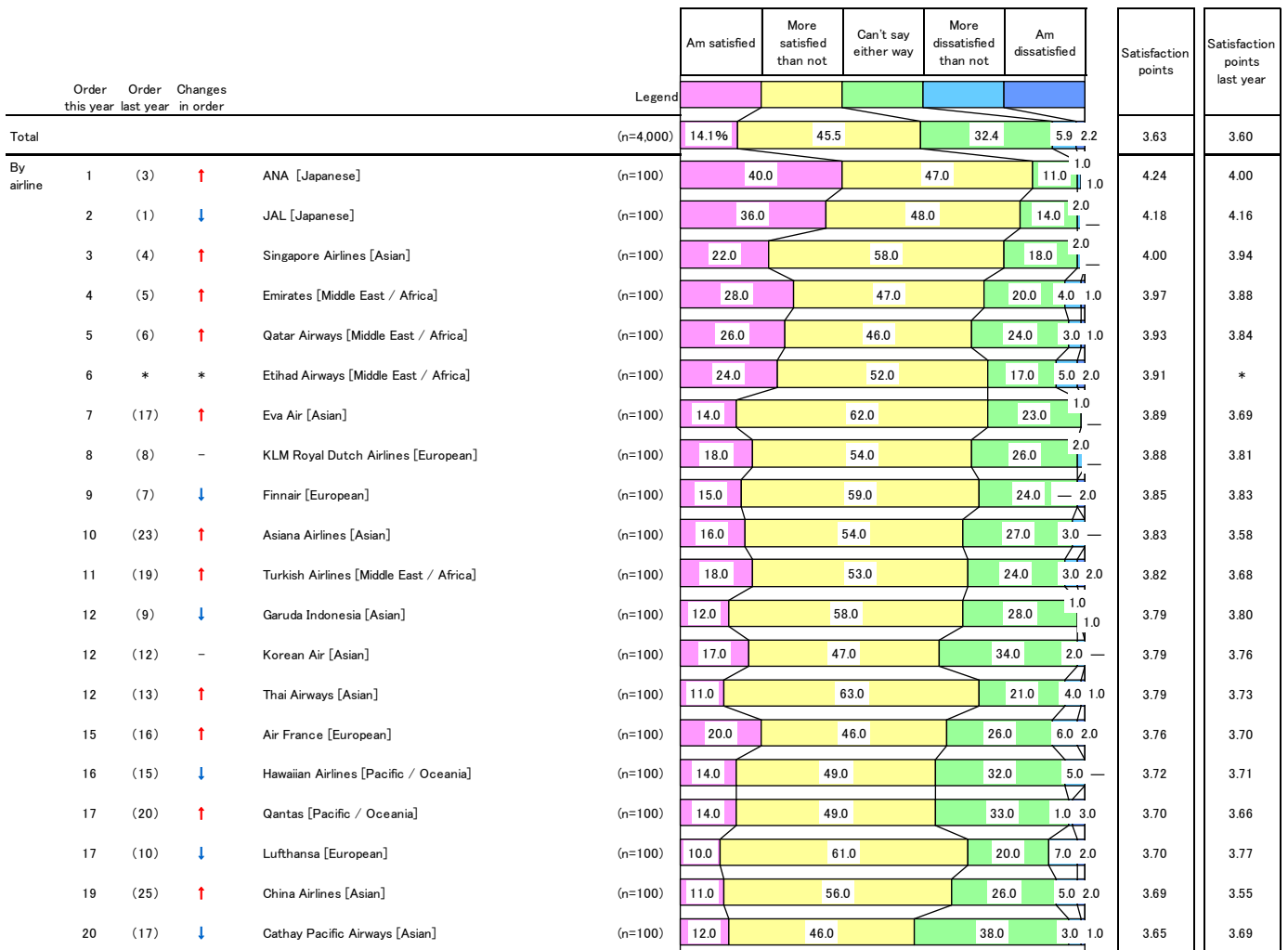


## 2. Satisfaction by Attribute

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

- For “Customer service by cabin crew,” the satisfaction total average was 3.63 points.
- ANA’s 4.24 points moved it from 3rd place last year to the top spot. This was followed by JAL (4.18 points) and Singapore Airlines (4.00 points).
- Eva Air (3.89 points) saw a sharp rise from 17th place last year to 7th place, while Asiana Airlines (3.83 points) also moved from 23rd place last year to 10th place.
- Among both the reasons for satisfaction and reasons for dissatisfaction, “Courtesy of response” 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	Attentiveness	Nice ambiance	Japanese language capable	Announcements at time of takeoff, landing, etc.	Other	Nothing in particular
Reasons for satisfaction	2,383	18.2	45.7	20.0	13.2	42.5	26.1	8.9	0.5	12.6
Reasons for dissatisfaction	1,617	8.0	18.0	5.6	13.7	14.3	17.0	3.2	2.1	46.6

† "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

- For “Customer service by the airline ground crew at the airport,” the satisfaction total average was 3.63 points.
- JAL (4.18 points) again took the top spot, as was the case last year. 2nd place was ANA (4.15 points). This was followed by Qatar Airways (3.90 points) and Emirates (3.89 points), which rose from 12nd place last year, and Eva Air (3.88 points) which increased its ranking from 14th place last year.
- Asiana Airlines (3.82 points) moved from 24th place last year to 9th place, while Garuda Indonesia (3.73 points) shot up from 25th place last year to 15th place.
- Among both the reasons for satisfaction and reasons for dissatisfaction, “Smoothness of check-in, baggage check” was given most.

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

Order this year	Order last year	Changes in order	Airline	Legend	Satisfaction levels					Satisfaction points	Satisfaction points last year	
					Am satisfied	More satisfied than not	Can't say either way	More dissatisfied than not	Am dissatisfied			
<b>Total</b>					(n=4,000)	13.4%	46.2	32.3	6.0	2.1	3.63	3.60
1	(1)	-	JAL [Japanese]	(n=100)	36.0	47.0	16.0	1.0	1.0	4.18	4.15	
2	(2)	-	ANA [Japanese]	(n=100)	36.0	47.0	14.0	2.0	1.0	4.15	3.96	
3	(12)	↑	Qatar Airways [Middle East / Africa]	(n=100)	25.0	47.0	22.0	5.0	1.0	3.90	3.72	
4	(12)	↑	Emirates [Middle East / Africa]	(n=100)	25.0	42.0	31.0	1.0	1.0	3.89	3.72	
5	(14)	↑	Eva Air [Asian]	(n=100)	11.0	67.0	21.0	1.0	1.0	3.88	3.71	
6	(3)	↓	Singapore Airlines [Asian]	(n=100)	15.0	59.0	24.0	2.0	1.0	3.87	3.95	
7	*	*	Ethiad Airways [Middle East / Africa]	(n=100)	23.0	49.0	20.0	6.0	2.0	3.85	*	
8	(8)	-	KLM Royal Dutch Airlines [European]	(n=100)	18.0	52.0	27.0	1.0	2.0	3.83	3.77	
9	(24)	↑	Asiana Airlines [Asian]	(n=100)	17.0	54.0	23.0	6.0	1.0	3.82	3.57	
9	(8)	↓	Korean Air [Asian]	(n=100)	14.0	54.0	32.0	1.0	1.0	3.82	3.77	
11	(16)	↑	Thai Airways [Asian]	(n=100)	12.0	63.0	18.0	6.0	1.0	3.79	3.69	
11	(5)	↓	Finnair [European]	(n=100)	13.0	55.0	31.0	1.0	1.0	3.79	3.87	
13	(11)	↓	Qantas [Pacific / Oceania]	(n=100)	17.0	49.0	30.0	3.0	1.0	3.78	3.74	
14	(17)	↑	Turkish Airlines [Middle East / Africa]	(n=100)	16.0	44.0	38.0	2.0	1.0	3.74	3.67	
15	(25)	↑	Garuda Indonesia [Asian]	(n=100)	12.0	55.0	28.0	4.0	1.0	3.73	3.56	
15	(14)	↓	Delta Air Lines [South / North American]	(n=100)	11.0	56.0	29.0	3.0	1.0	3.73	3.71	
17	(21)	↑	China Airlines [Asian]	(n=100)	11.0	55.0	31.0	1.0	2.0	3.72	3.62	
17	(19)	↑	Air France [European]	(n=100)	15.0	47.0	33.0	5.0	1.0	3.72	3.65	
19	(10)	↓	Cathay Pacific Airways [Asian]	(n=100)	12.0	53.0	29.0	5.0	1.0	3.70	3.76	
20	(6)	↓	Lufthansa [European]	(n=100)	9.0	58.0	24.0	8.0	1.0	3.66	3.83	

† 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	2,386	64.7	27.5	14.3	4.9	0.6	24.6
Reasons for dissatisfaction	1,614	25.9	14.6	7.2	3.3	3.3	56.1

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

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

## 2. Satisfaction by Attribute

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

- The “Inflight food and drink service” satisfaction total average was 3.53 points.
- As was the case last year, Emirates took the top spot with 4.04 points. This was followed by Qatar Airways (3.99 points) and Singapore Airlines (3.96 points).
- Among both the reasons for satisfaction and reasons for dissatisfaction, “Taste of meals” was given most.

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

Order this year	Order last year	Changes in order	Airline	Legend	Satisfaction levels					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=3,687)					13.2%	43.0		31.2	8.8	3.53	3.57
By airline	1	(1)	-	Emirates [Middle East / Africa]	(n=100)	29.0	51.0	15.0	5.0	4.04	3.98
	2	(5)	↑	Qatar Airways [Middle East / Africa]	(n=100)	29.0	48.0	18.0	3.0 2.0	3.99	3.89
	3	(3)	-	Singapore Airlines [Asian]	(n=100)	20.0	59.0	18.0	3.0	3.96	3.92
	4	*	*	Etihad Airways [Middle East / Africa]	(n=100)	27.0	49.0	16.0	6.0 2.0	3.93	*
	5	(6)	↑	ANA [Japanese]	(n=100)	24.0	53.0	16.0	5.0 2.0	3.92	3.83
	5	(4)	↓	JAL [Japanese]	(n=100)	26.0	49.0	18.0	5.0 2.0	3.92	3.90
	7	(7)	-	Turkish Airlines [Middle East / Africa]	(n=100)	23.0	51.0	20.0	3.0 3.0	3.88	3.81
	8	(9)	↑	KLM Royal Dutch Airlines [European]	(n=100)	23.0	46.0	24.0	7.0	3.85	3.78
	9	(20)	↑	Eva Air [Asian]	(n=100)	16.0	53.0	28.0	3.0	3.82	3.52
	10	(16)	↑	Thai Airways [Asian]	(n=100)	11.0	63.0	23.0	2.0 1.0	3.81	3.59
	11	(8)	↓	Air France [European]	(n=100)	20.0	50.0	20.0	7.0 3.0	3.77	3.79
	12	(14)	↑	Garuda Indonesia [Asian]	(n=100)	11.0	56.0	30.0	2.0 1.0	3.74	3.69
	13	(10)	↓	Finnair [European]	(n=100)	10.0	58.0	25.0	5.0 2.0	3.69	3.76
	14	(10)	↓	Lufthansa [European]	(n=100)	10.0	56.0	25.0	8.0 1.0	3.66	3.76
	15	(16)	↑	Delta Air Lines [South / North American]	(n=100)	16.0	46.0	27.0	8.0 3.0	3.64	3.59
	16	(15)	↓	Qantas [Pacific / Oceania]	(n=100)	12.0	49.0	31.0	6.0 2.0	3.63	3.61
	17	(20)	↑	China Airlines [Asian]	(n=100)	10.0	52.0	31.0	3.0 4.0	3.61	3.52
	18	(18)	-	Korean Air [Asian]	(n=100)	15.0	43.0	30.0	9.0 3.0	3.58	3.54
	19	(25)	↑	Hawaiian Airlines [Pacific / Oceania]	(n=100)	14.0	38.0	38.0	9.0 1.0	3.55	3.42
	20	(23)	↑	Alitalia [European]	(n=100)	8.0	52.0	29.0	8.0 3.0	3.54	3.48

† 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, Scoot, Tigerair Taiwan, Jeju Air, Jetstar, 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	Diversity of the meal menu	Refreshments, snacks, desserts	Soft drinks	Alcoholic beverages	Extent of meals and drinks provided for free	Other	Nothing in particular	
Reasons for satisfaction	2,073	61.8	38.1	19.2	21.0	28.2	29.8	28.4	0.4	6.6
Reasons for dissatisfaction	1,614	45.5	11.3	20.9	6.6	4.7	5.8	11.0	2.7	30.7

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

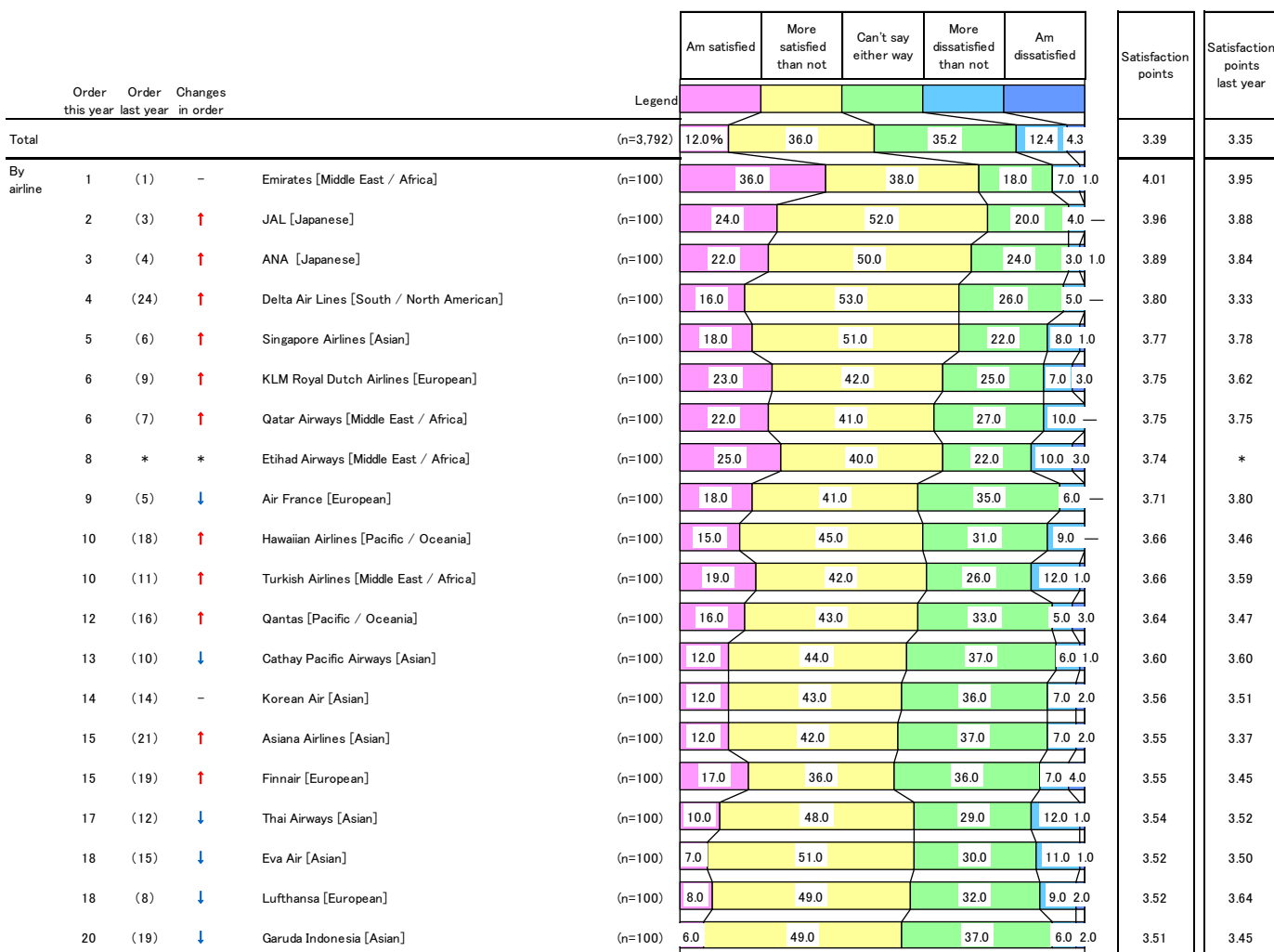
† “Reasons for dissatisfaction” were asked to those who gave “Can’t say either way”, “More dissatisfied than not” or “Am dissatisfied.”

## 2. Satisfaction by Attribute

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

- The “Inflight entertainment” satisfaction total average was 3.39 points, which was the lowest score among all five categories.
- As was the case last year, Emirates took the top spot with 4.01 points. This was followed by JAL (3.96 points) and ANA (3.89 points).
- As both reasons for satisfaction and reasons for dissatisfaction, "Number of TV channels and movies," "Movies/TV programs available," and “Whether movies/TV available in Japanese language” 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: AirAsia X, Jetstar Asia Airways, Scoot, Tigerair Taiwan, Jeju Air, Vanilla Air, Peach Aviation.

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

(96)

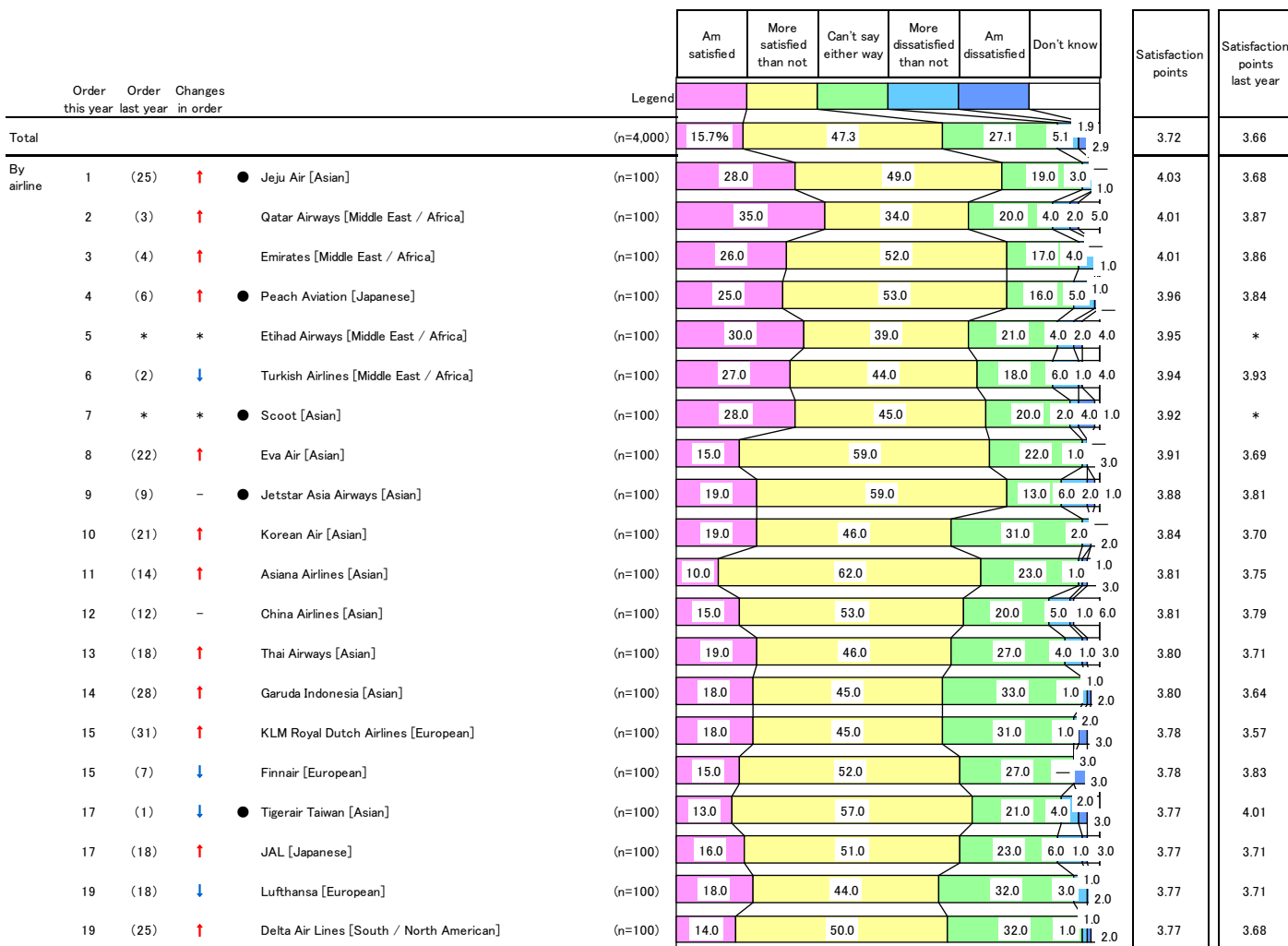
	Sample	Number of TV channels and movies	Movies/TV programs available	Whether movies/TV available in Japanese language	Number of music channels	Music program content	Whether there is Japanese content (Japanese movies, Japanese music, etc.)	Game types/content	In-flight magazine	Magazines, newspapers	On-demand broadcasts	Seatback TV	Content that can connect to dedicated apps on my own smartphone/tablet	Extent of the free entertainment that is available	Prices, selection, etc. of in-flight sales	Other	Nothing in particular
Reasons for satisfaction	1,821	36.8	42.0	33.0	10.4	8.7	16.1	6.8	9.6	5.7	2.6	2.9	2.1	8.2	2.7	0.3	16.5
Reasons for dissatisfaction	1,971	17.0	21.3	23.5	4.9	5.0	12.4	2.6	5.2	4.4	1.1	2.3	1.4	6.8	2.2	2.5	40.3

† "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."

### 3. Satisfaction with Cost Performance: TOP20

- The cost performance satisfaction total average was 3.72 points.
- In the top spot was Jeju Air (4.03 points), which sharply increased from 25th place last year. This was followed by Qatar Airways (4.01 points) and Emirates (4.01 points).
- Among both the reasons for satisfaction and reasons for dissatisfaction, "Air fare ticket" 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.

† Since ranking is assigned up to third place by the value after the decimal point, ranking may differ despite an identical satisfaction score.

† 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	2,519	65.0	38.6	32.1	20.2	22.0	21.3	24.0	2.1	4.3
Reasons for dissatisfaction	1,364	33.5	24.3	14.9	10.3	15.2	19.2	7.3	5.2	28.2

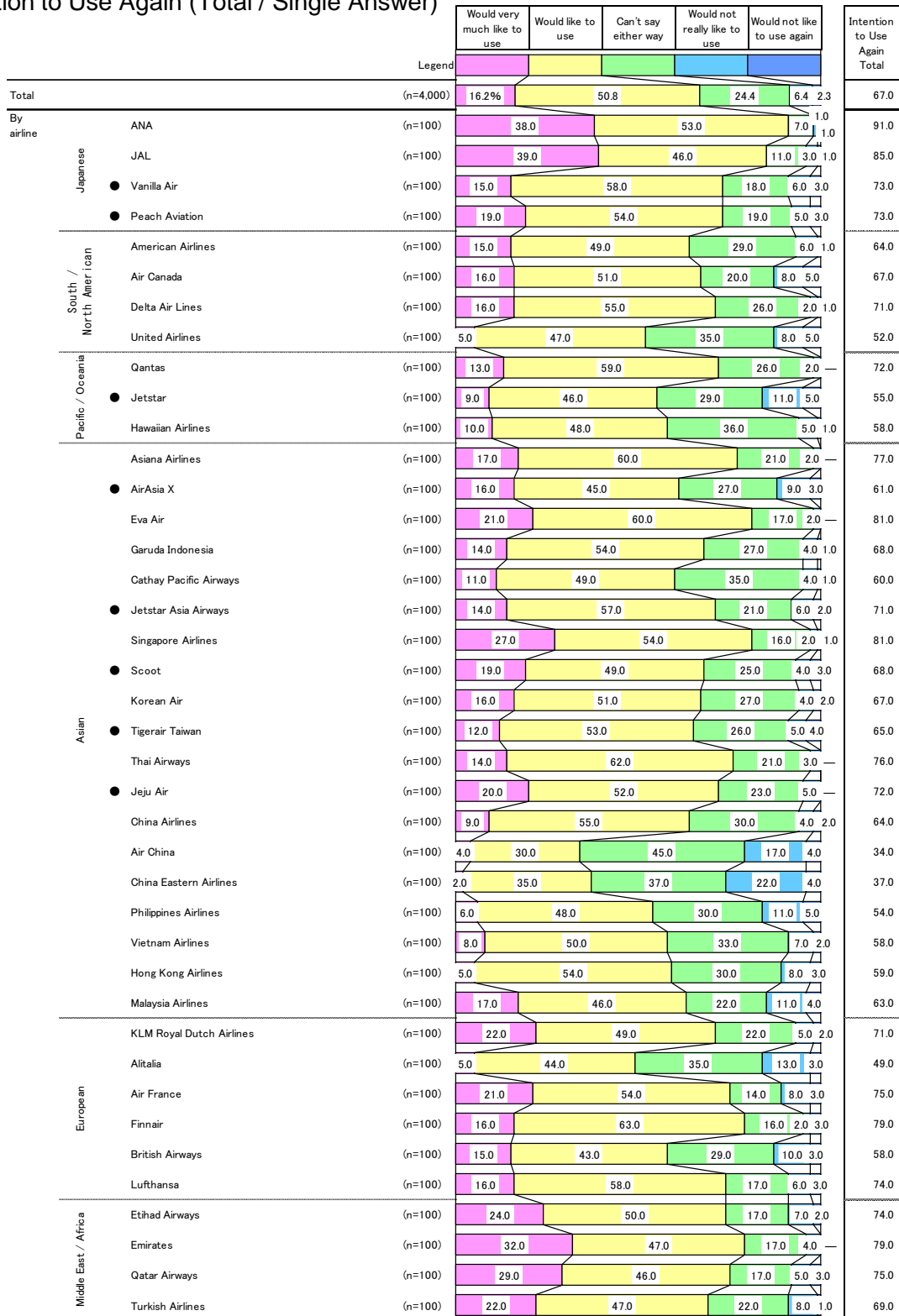
† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

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

## 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” (16.2%)) was 67%.
- By airline, at the top of the “Intention to use again - total” ranking was ANA (91%). 2nd place was JAL (85%). This was followed by Eva Air and Singapore Airlines (both 81%).
- Among LCC, the Vanilla Air and Peach Aviation “intention to use again – total” was 73%, which made them both 13th place among the total.

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



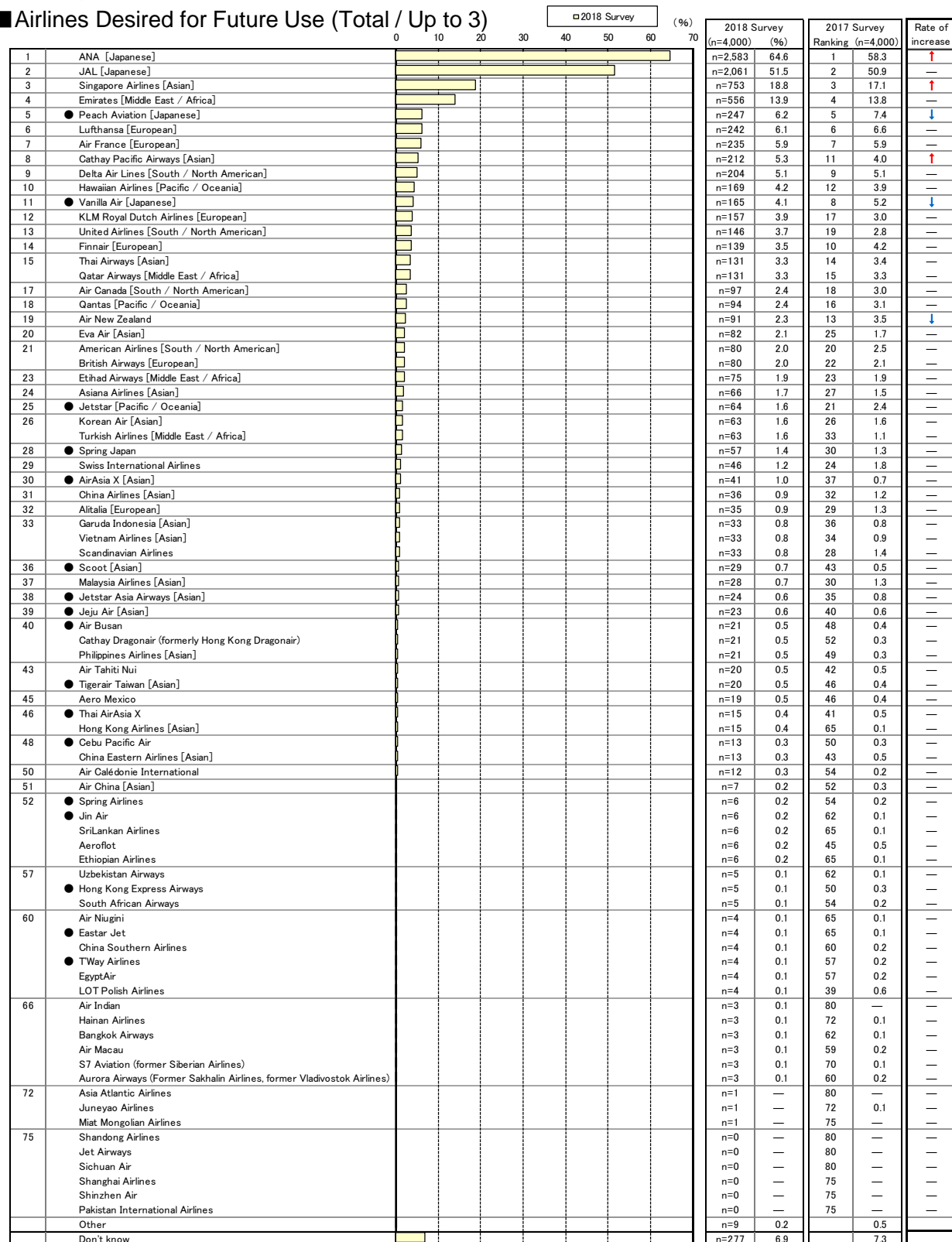
† "●" indicates a low-cost carrier (LCC)

## 5. Airlines Desired for Future Use

● When respondents were asked about airlines they would like to use again, the highest percentage gave ANA (65%), which was the same result as last year. This was followed by JAL (52%), 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 6%.

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



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

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

† Rate of increase: The arrow indicates increases/decreases for airlines for which there were changes of plus or minus one point between the 2017 survey and 2018 survey.

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