

イーロード  
**AB-ROAD**

**2020**

**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 2019.

## ○Respondents

The survey was done on 8,676 respondents selected from the Mighty Monitors of INTAGE Inc. These were Japanese citizens aged 18 years and over who traveled overseas in the year 2019 (the month of departure being in 2019).

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

## ○Timing

Wed. 15 April through Mon. 20 April, 2020

## ○Research Method

Internet survey

## ○Tabulation Numbers

4,000 respondents (respondents contacted: 8,676, samples collected: 4,631s (successful collection rate of 53.4%))

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

### ■Airlines included in the survey

ANA, JAL, Peach Aviation, American Airlines, Air Canada, Delta Air Lines, United Airlines, Qantas, Jetstar, Air New Zealand, Hawaiian Airlines, Asiana Airlines, AirAsia X, Eva Air, Garuda Indonesia, Cathay Pacific Airways, Singapore Airlines, Scoot, Cebu Pacific Air, Korean Air, Tigerair Taiwan, Thai Airways, Jeju Air, China Airlines, Air China, China Eastern Airlines, T'Way Airlines, Philippines Airlines, Vietnam Airlines, Malaysia Airlines, Alitalia, Air France, KLM Royal Dutch Airlines, Turkish Airlines, Finnair, British Airways, Lufthansa, Etihad Airways, Emirates, Qatar Airways

\* **The airlines included in this survey are the top 40 airlines used in the last trip taken in the year 2019, according to the results of the "2020 AB-ROAD Overseas Travel Survey" (see below).**

\* **Turkish Airlines had been classified as a Middle Eastern/African airline through the 2019 survey, but is now considered a European airlines since 2020.**

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.  
"2019 Airline Satisfaction Survey" - Timing: 11 April through 15 April 2019; Sample size tabulated: 4,000s (100 samples for each airline)
- (3) In this survey, respondents who in 2019 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.

## "2020 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 2019 (the month of departure being in 2019).

### ○Timing

Thu. 19 Mar through Wed. 25 Mar, 2020

### ○Research Method

Internet survey

### ○Numbers Tabulated

5,454 respondents (respondents contacted: 9,809; samples collected: 5,576 (successful collection rate of :56.8%))

### ○Method of Tabulation

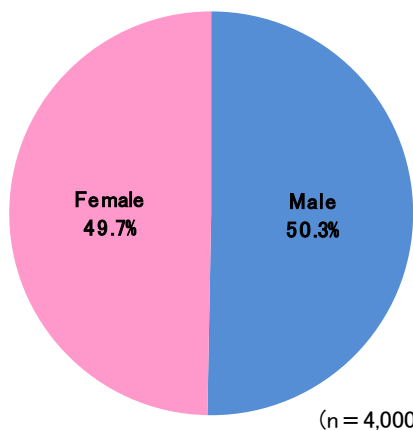
The survey results were weighted to correspond with the breakdown of leisure travelers (by gender and age).

The weightings used are as follows.

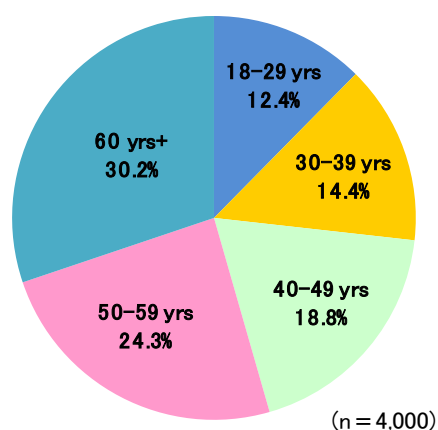
	18-29 yrs	30-39 yrs	40-49 yrs	50-59 yrs	60 yrs+
Male	1.17268569	0.94316794	0.76852064	0.78901432	0.93476248
Female	1.19938382	1.07416096	1.14031462	1.15627534	1.09076780

## 2. Profile of the Respondents

■ Gender (Total / Single Answer)



■ Age (Total / Single Answer)



■ Area of Residence (Total / Single Answer)

		Hokkaido	Tohoku	Kanto Total	Kita Kanto	4 prefectures	Hokuriku/ Koshinetsu	Chubu/ Tokai	Kansai Total	Keihanshin	Other Kinki	Chugoku	Shikoku	Kyushu/ Okinawa
Sample	4,000	2.8	2.4	48.2	2.8	45.4	3.4	11.2	22.2	19.0	3.2	2.9	1.6	5.4
Total														

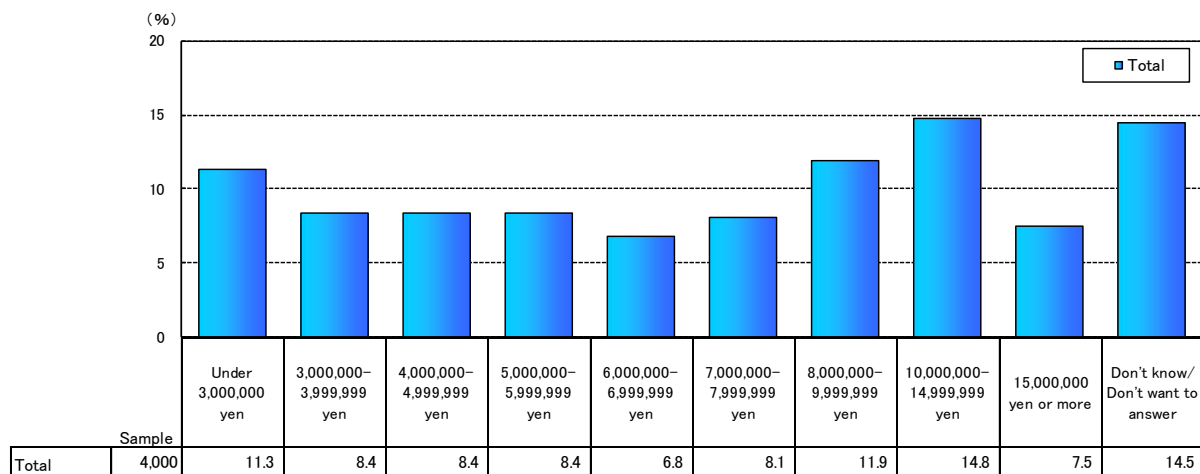
(%)

■ Occupation (Total / Single Answer)

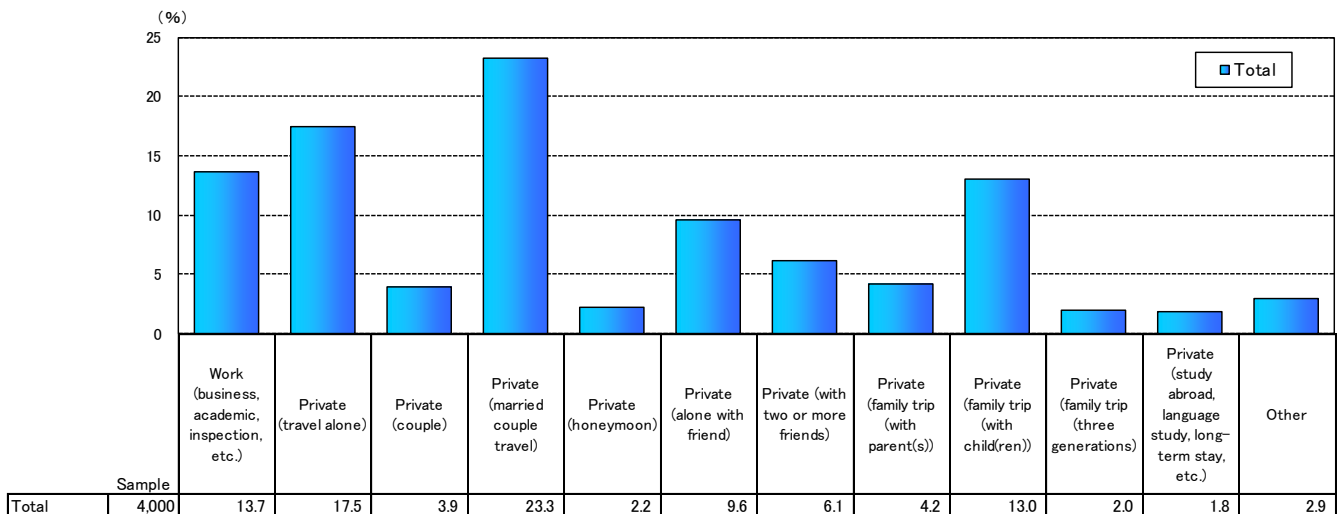
	Sample	Office workers					Civil servants/ Educators	Self-employed	Freelance	Temporary worker/ Contracted employee	Part-timers	Students	Full-time homemaker	Unemployed	Other
		Office workers/ General (clerical)	Office workers/ General (research or technical)	Office workers/ General (sales)	Office workers/ General (others)	Office workers/ Manager class, company directors									
Total	4,000	15.7	7.9	5.3	4.7	13.0	4.7	5.2	2.9	4.1	9.4	3.2	12.4	10.2	1.3

(%)

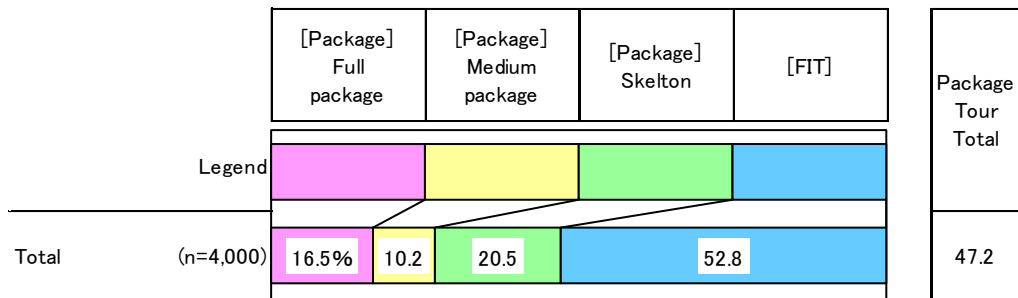
■ Annual Household Income (Total / Single Answer)



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

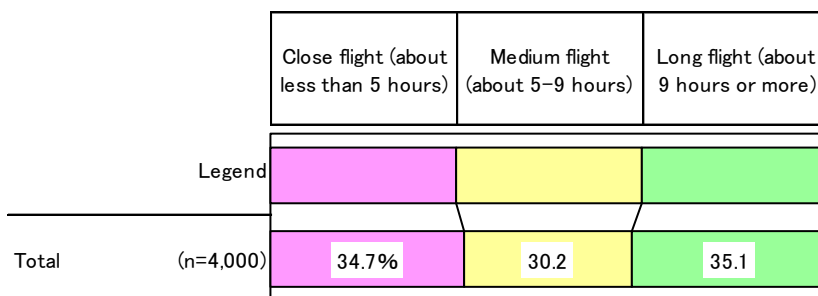


### ■ Overseas Travel Type (Total / Single Answer)

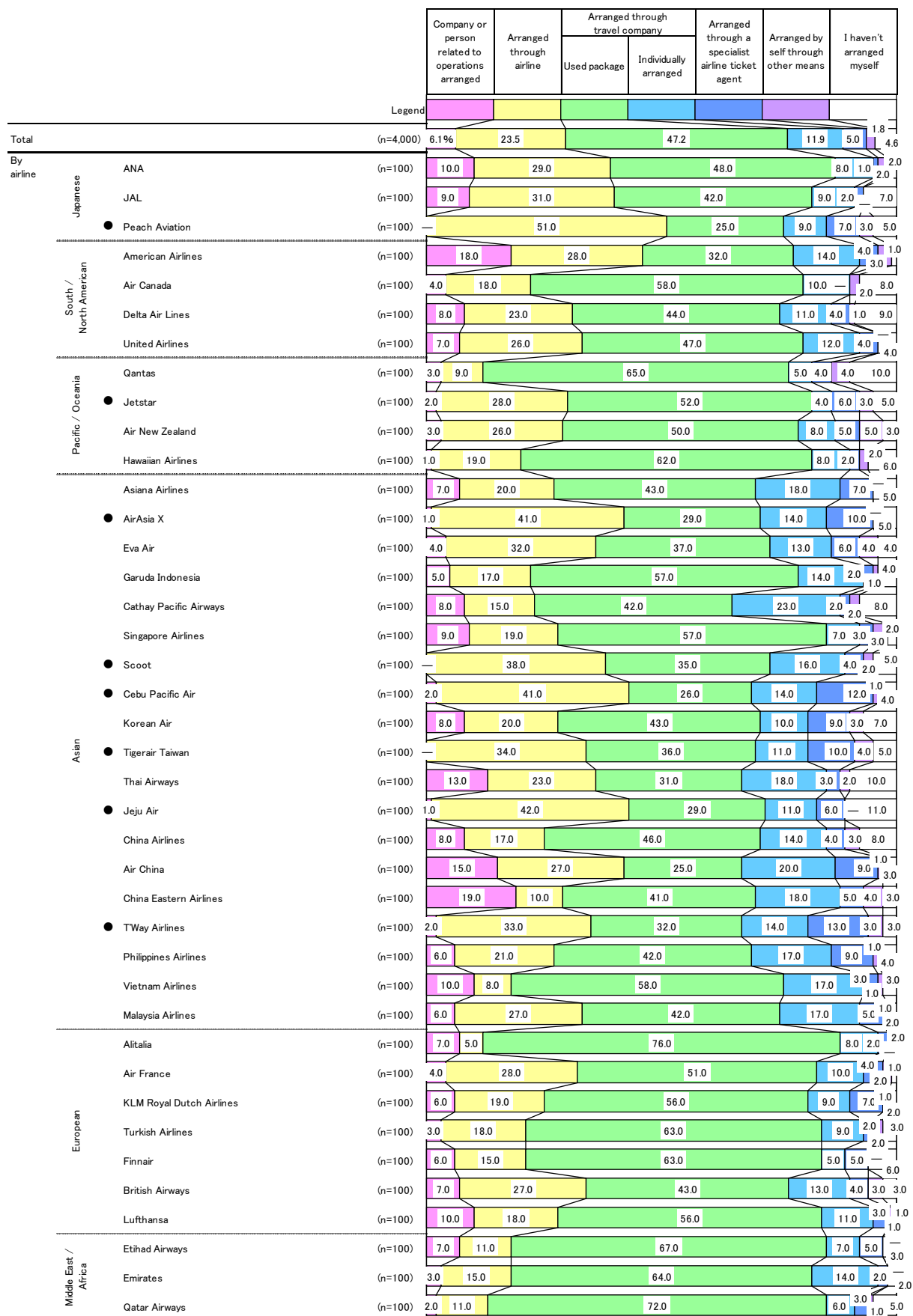


- † [Package] Full package : Tour that is scheduled with sightseeing, activities, and most meals
- [Package] Medium package : Tour that is scheduled with some sightseeing, activities, and meals, as well as tours with some free time
- [Package] Skelton : Tour that basically has free time at destinations,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

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



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



† "Arranged through a specialist airline ticket agent" indicates those who arranged with the use of (an app of) a site of a specialist airline ticket agent

† ● indicates a low-cost carrier (LCC)

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

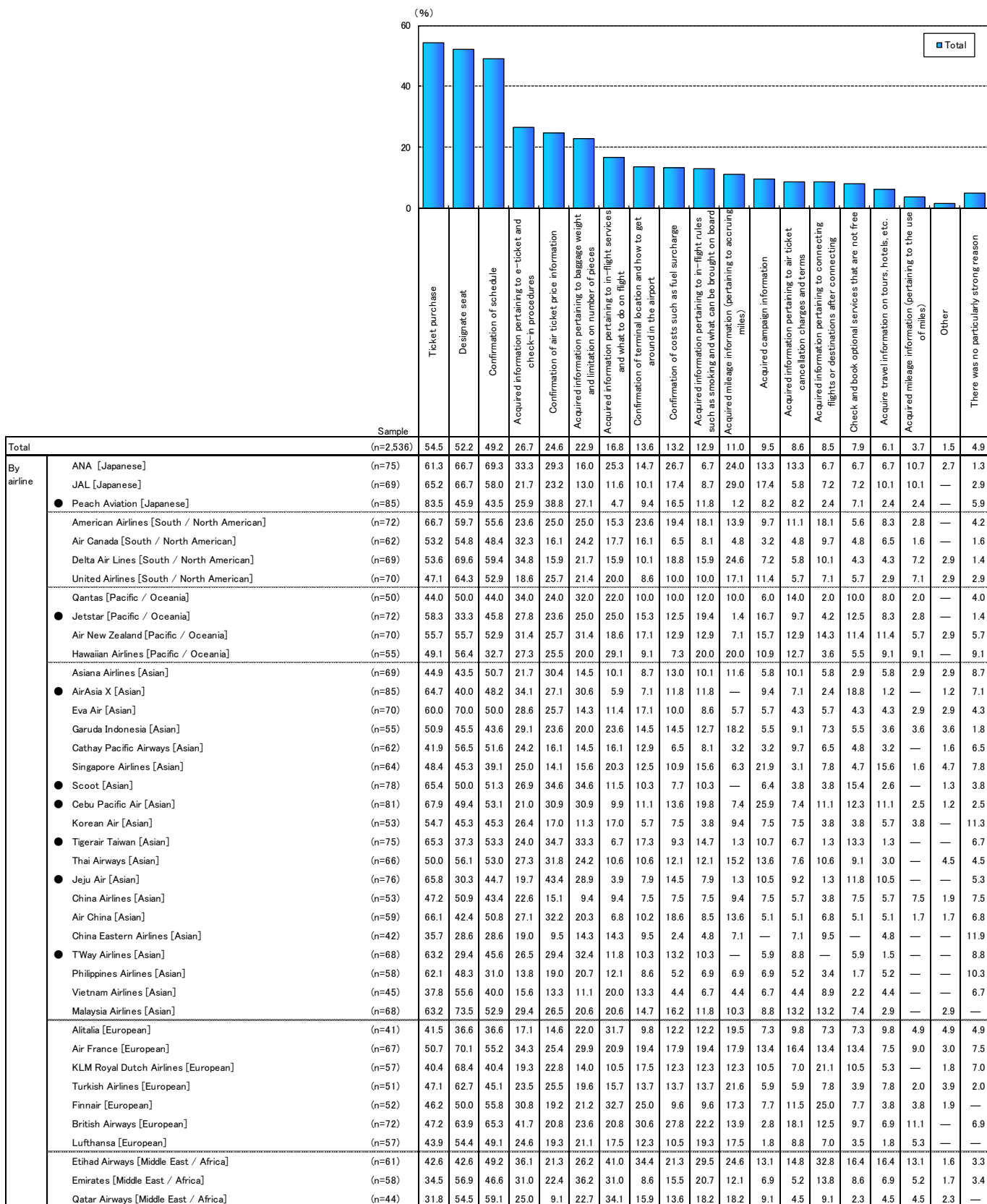
		Used	Didn't use	Period used		
Legend				Prior to booking	At time of booking	After booking
Total	(n=4,000)	63.4%	36.6	58.2	52.3	56.4
By airline						
● AirAsia X [Asian]	(n=100)	85.0	15.0	81.0	77.0	76.0
● Peach Aviation [Japanese]	(n=100)	85.0	15.0	83.0	83.0	79.0
● Cebu Pacific Air [Asian]	(n=100)	81.0	19.0	78.0	73.0	71.0
● Scoot [Asian]	(n=100)	78.0	22.0	65.0	69.0	75.0
● Jeju Air [Asian]	(n=100)	76.0	24.0	74.0	70.0	68.0
● Tigerair Taiwan [Asian]	(n=100)	75.0	25.0	73.0	70.0	65.0
ANA [Japanese]	(n=100)	75.0	25.0	72.0	69.0	72.0
● Jetstar [Pacific / Oceania]	(n=100)	72.0	28.0	63.0	59.0	64.0
British Airways [European]	(n=100)	72.0	28.0	68.0	54.0	67.0
American Airlines [South / North American]	(n=100)	72.0	28.0	68.0	63.0	65.0
Eva Air [Asian]	(n=100)	70.0	30.0	65.0	64.0	63.0
Air New Zealand [Pacific / Oceania]	(n=100)	70.0	30.0	66.0	61.0	63.0
United Airlines [South / North American]	(n=100)	70.0	30.0	63.0	58.0	59.0
Asiana Airlines [Asian]	(n=100)	69.0	31.0	66.0	58.0	55.0
Delta Air Lines [South / North American]	(n=100)	69.0	31.0	62.0	56.0	67.0
JAL [Japanese]	(n=100)	69.0	31.0	67.0	65.0	62.0
● TWay Airlines [Asian]	(n=100)	68.0	32.0	64.0	63.0	60.0
Malaysia Airlines [Asian]	(n=100)	68.0	32.0	64.0	55.0	62.0
Air France [European]	(n=100)	67.0	33.0	62.0	53.0	65.0
Thai Airways [Asian]	(n=100)	66.0	34.0	59.0	53.0	56.0
Singapore Airlines [Asian]	(n=100)	64.0	36.0	54.0	50.0	58.0
Cathay Pacific Airways [Asian]	(n=100)	62.0	38.0	56.0	48.0	58.0
Air Canada [South / North American]	(n=100)	62.0	38.0	58.0	45.0	53.0
Etihad Airways [Middle East / Africa]	(n=100)	61.0	39.0	57.0	48.0	57.0
Air China [Asian]	(n=100)	59.0	41.0	55.0	50.0	50.0
Philippines Airlines [Asian]	(n=100)	58.0	42.0	52.0	48.0	52.0
Emirates [Middle East / Africa]	(n=100)	58.0	42.0	49.0	40.0	51.0
KLM Royal Dutch Airlines [European]	(n=100)	57.0	43.0	48.0	42.0	50.0
Lufthansa [European]	(n=100)	57.0	43.0	50.0	44.0	51.0
Garuda Indonesia [Asian]	(n=100)	55.0	45.0	46.0	41.0	48.0
Hawaiian Airlines [Pacific / Oceania]	(n=100)	55.0	45.0	46.0	40.0	51.0
Korean Air [Asian]	(n=100)	53.0	47.0	48.0	43.0	45.0
China Airlines [Asian]	(n=100)	53.0	47.0	49.0	45.0	41.0
Finnair [European]	(n=100)	52.0	48.0	48.0	36.0	46.0
Turkish Airlines [European]	(n=100)	51.0	49.0	47.0	38.0	42.0
Qantas [Pacific / Oceania]	(n=100)	50.0	50.0	46.0	40.0	43.0
Vietnam Airlines [Asian]	(n=100)	45.0	55.0	40.0	36.0	40.0
Qatar Airways [Middle East / Africa]	(n=100)	44.0	56.0	39.0	26.0	37.0
China Eastern Airlines [Asian]	(n=100)	42.0	58.0	39.0	30.0	30.0
Alitalia [European]	(n=100)	41.0	59.0	37.0	29.0	35.0

† Those who used a website/app at any step of getting air tickets (before, during, or after booking the ticket) are regarded as having answered "Used."

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

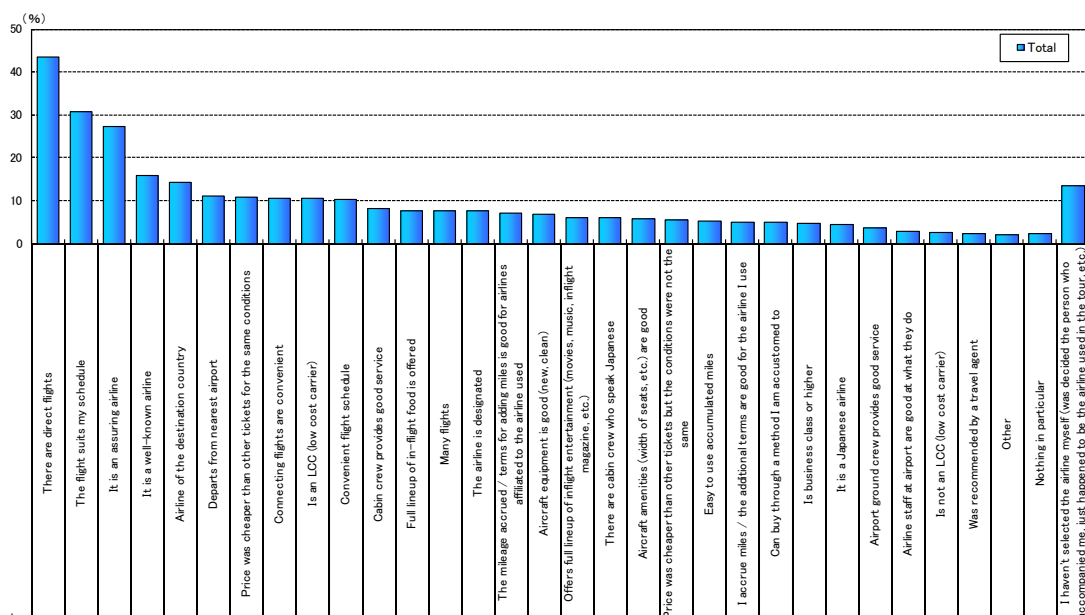


■ Purpose for Use of Airline Website/app (Airline website/app user / Multiple Answer)



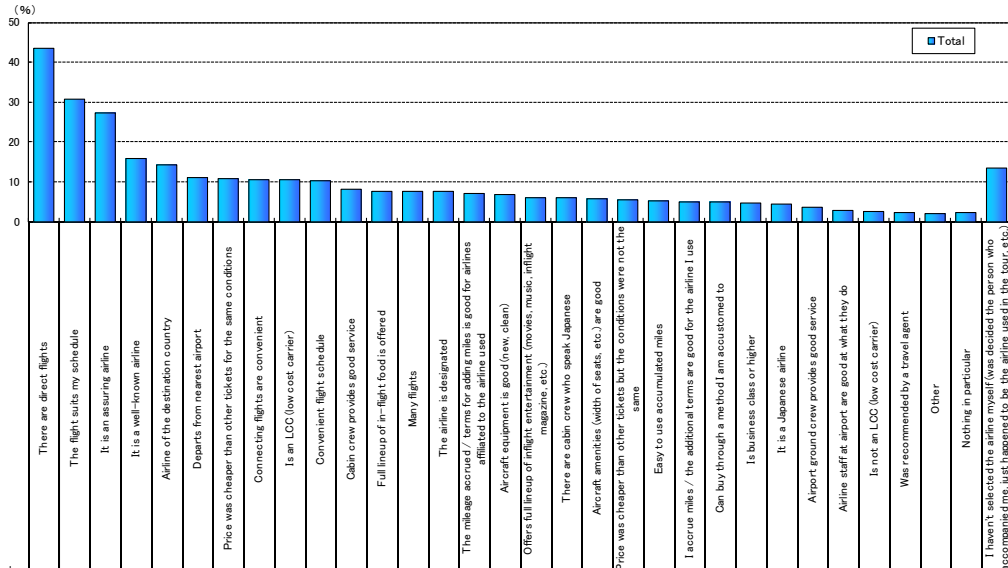
† "●" indicates a low-cost carrier (LCC)

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



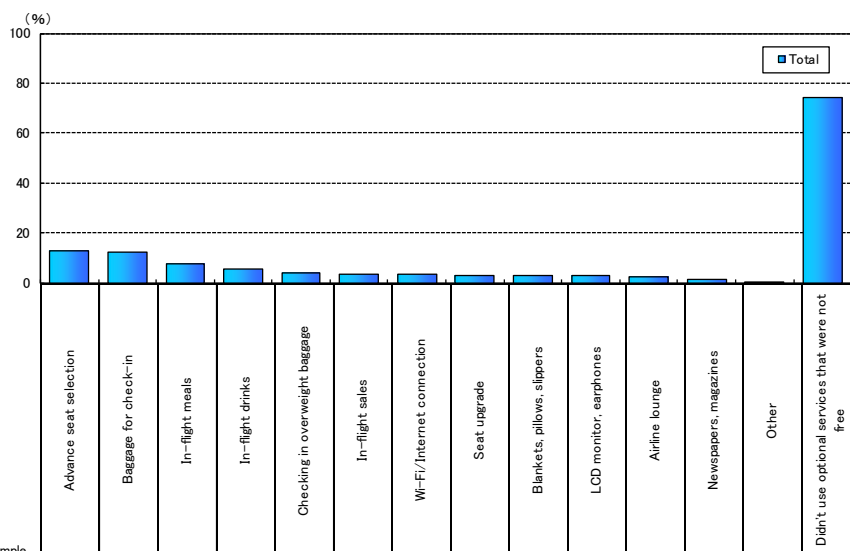
Sample																																	
Total (n=4,000)		43.4	30.7	27.2	15.8	14.3	11.0	10.9	10.6	10.5	10.3	8.0	7.6	7.6	7.5	7.0	6.8	6.1	5.9	5.7	5.5	5.3	5.0	4.8	4.6	4.5	3.7	2.9	2.4	2.3	2.1	2.1	13.3
Gender	Male (n=2,013)	44.9	28.4	28.1	17.3	17.0	10.8	10.5	11.4	11.1	11.0	9.4	7.4	8.6	7.1	9.4	8.0	5.9	6.3	6.3	5.3	6.5	5.6	5.5	5.9	5.8	4.3	3.4	2.3	1.9	2.0	2.3	12.8
	Female (n=1,987)	42.0	33.0	26.2	14.3	11.6	11.2	11.4	9.9	9.8	9.6	6.6	7.8	6.5	7.9	4.6	5.6	6.3	5.4	5.0	5.8	4.0	4.4	4.1	3.2	3.2	3.0	2.3	2.5	2.7	2.1	2.2	13.9
Age	18-29 yrs (n=494)	42.9	29.4	29.6	17.6	8.7	8.9	12.1	9.1	17.0	7.9	6.9	8.5	7.7	4.5	2.4	4.9	4.9	6.3	3.4	5.9	2.2	2.2	3.0	1.0	3.6	2.6	1.8	1.4	3.4	1.0	4.3	10.9
	30-39 yrs (n=576)	44.6	34.0	31.9	17.5	10.2	11.6	15.6	9.7	13.5	10.8	7.1	8.3	9.5	4.2	5.4	5.2	6.3	5.4	4.7	5.9	5.2	4.2	5.2	2.4	5.2	4.0	3.3	2.4	2.3	2.1	2.4	8.2
	40-49 yrs (n=753)	44.5	34.8	25.6	13.8	12.7	11.4	12.9	11.0	11.0	11.7	8.9	7.4	9.4	4.1	7.7	6.4	6.9	5.4	5.4	7.3	6.5	6.9	5.0	3.1	4.8	4.2	2.5	2.3	2.3	1.7	2.8	10.9
	50-59 yrs (n=971)	44.6	33.5	25.7	13.4	14.6	12.2	9.0	10.5	8.1	11.2	6.6	6.9	7.0	7.3	8.9	7.4	5.5	4.5	5.3	4.7	4.9	6.4	4.4	6.6	5.0	2.4	2.0	3.3	1.6	2.8	2.2	10.6
60 yrs or older (n=1,206)	41.5	24.8	26.0	17.4	19.3	10.4	8.5	11.5	7.8	9.4	9.5	7.5	5.8	12.4	7.7	8.1	6.5	7.2	7.5	4.7	6.1	4.2	5.4	6.3	3.9	4.6	4.1	2.2	2.5	2.1	1.2	20.5	
Area of residence	Kanto (n=1,927)	43.3	30.9	27.9	16.2	15.9	9.7	11.6	11.2	7.7	10.9	8.0	8.3	8.6	7.9	8.6	7.6	6.8	6.2	6.5	5.8	6.0	6.7	4.9	6.0	5.2	3.8	3.2	2.8	2.0	2.0	2.3	13.0
	Kansai (n=887)	44.3	32.4	28.6	16.5	14.2	14.1	10.4	9.6	14.2	12.0	8.7	8.3	7.7	7.1	5.3	5.5	5.2	6.3	4.7	6.9	5.0	3.4	5.0	3.0	4.8	3.8	2.8	1.7	2.7	2.0	2.1	12.3
	Tokai (n=448)	42.4	29.5	24.8	14.5	11.2	13.6	11.4	10.3	12.5	7.8	6.7	4.5	4.7	7.1	4.2	8.5	4.5	3.1	5.4	4.2	3.6	3.8	3.3	4.9	1.3	3.3	2.2	2.9	2.5	2.0	2.7	16.5
Travel type	Package (n=1,887)	37.1	22.4	26.4	17.1	12.9	9.3	5.2	7.3	5.7	7.2	8.5	8.3	6.5	13.7	5.4	7.2	6.8	6.4	6.0	2.4	3.7	3.5	2.5	3.8	4.5	4.4	3.2	2.4	3.9	1.4	1.3	22.9
	Full package (n=661)	22.7	8.9	21.5	16.0	9.1	4.7	1.7	5.1	2.9	3.5	5.7	7.4	3.8	17.5	6.4	5.9	6.5	6.8	4.8	1.2	3.0	2.3	1.2	4.5	4.7	3.3	2.6	1.8	3.5	1.5	1.2	38.6
	Medium package (n=408)	36.0	22.3	27.9	18.4	14.7	9.3	5.1	8.3	4.4	4.9	11.8	10.0	6.9	16.4	6.9	9.3	9.1	6.6	8.8	2.0	3.9	3.7	2.7	4.7	5.4	5.4	5.4	2.2	6.1	1.5	0.5	21.8
	Skelton (n=818)	49.4	33.3	29.7	17.2	15.0	13.0	8.2	8.6	8.6	11.2	9.0	8.1	8.6	9.3	3.9	7.2	5.9	5.9	5.6	3.5	4.2	4.4	3.5	2.8	3.9	4.8	2.6	2.9	3.2	1.3	1.7	10.8
FIT (n=2,113)	49.0	38.1	27.8	14.7	15.6	12.6	16.0	13.6	14.7	13.1	7.6	7.0	8.5	1.8	8.4	6.4	5.4	5.4	5.3	8.3	6.7	6.3	6.8	5.2	4.5	3.0	2.6	2.4	0.9	2.6	3.2	4.8	
Accompanying traveler	Travel alone (n=700)	42.7	36.1	27.6	16.0	14.7	12.0	14.7	12.3	14.7	12.7	8.6	10.1	8.4	5.9	9.1	8.3	6.7	5.0	5.9	7.9	7.9	6.4	7.4	4.6	4.1	2.9	2.3	2.9	1.0	3.4	2.6	8.4
	With spouse/partner/on honeymoon (n=1,171)	41.1	26.8	28.0	17.2	16.2	10.0	8.4	11.7	7.7	8.5	7.9	8.3	7.9	10.9	7.8	7.1	6.2	6.1	6.6	3.5	5.7	5.2	4.0	6.0	4.5	3.9	3.2	1.6	2.7	2.0	1.5	16.9
	With friend (n=629)	42.1	33.4	23.2	14.3	10.3	9.9	13.7	7.8	16.4	9.4	4.9	4.1	5.4	7.3	3.5	4.0	3.5	5.7	4.6	7.6	3.0	2.9	4.3	2.1	4.0	2.2	2.2	1.6	3.3	1.7	2.9	12.4
Family travel (n=766)	48.4	30.8	27.3	15.9	14.1	14.4	11.5	9.0	11.2	11.4	9.0	9.4	7.4	7.0	5.5	6.9	8.0	6.4	5.1	5.6	5.1	4.3	4.8	3.7	3.9	4.8	3.8	3.8	2.5	1.4	1.7	11.1	
Travel class	Is business class or higher (n=507)	41.2	32.7	39.1	23.9	19.5	9.1	8.3	16.0	3.4	12.4	19.3	18.7	11.8	8.7	17.9	18.1	12.2	8.9	19.1	2.8	15.8	12.0	8.9	34.3	8.5	11.4	8.1	3.2	1.0	2.0	0.8	7.1
	Economy class (n=3,493)	43.7	30.4	25.4	14.6	13.6	11.3	11.3	9.8	11.5	10.0	6.4	6.0	6.9	7.3	5.4	5.2	5.2	5.4	3.7	5.9	3.8	4.0	4.2	0.2	3.9	2.5	2.1	2.3	2.5	2.1	2.5	14.2

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



Total		Sample (n=4,000)	43.4	30.7	27.2	15.8	14.3	11.0	10.9	10.6	10.5	10.3	8.0	7.6	7.6	7.5	7.0	6.8	6.1	5.9	5.7	5.5	5.3	5.0	4.8	4.6	4.5	3.7	2.9	2.4	2.3	2.1	2.3	13.3		
By airline	ANA [Japanese]	(n=100)	44.0	28.0	68.0	33.0	4.0	17.0	4.0	10.0	—	12.0	23.0	11.0	8.0	8.0	10.0	17.0	18.0	23.0	9.0	3.0	22.0	21.0	5.0	12.0	58.0	13.0	12.0	4.0	1.0	1.0	2.0	8.0		
	JAL [Japanese]	(n=100)	37.0	30.0	68.0	33.0	5.0	10.0	2.0	4.0	—	15.0	11.0	11.0	9.0	5.0	8.0	13.0	12.0	21.0	13.0	—	17.0	12.0	7.0	10.0	41.0	10.0	9.0	1.0	2.0	3.0	3.0	10.0		
	● Peach Aviation [Japanese]	(n=100)	49.0	29.0	18.0	14.0	1.0	22.0	16.0	2.0	48.0	20.0	3.0	1.0	7.0	3.0	2.0	2.0	3.0	14.0	2.0	11.0	2.0	2.0	12.0	1.0	20.0	2.0	2.0	4.0	—	1.0	1.0	2.0	4.0	
● American Airlines [South / North American]	American Airlines [South / North American]	(n=100)	29.0	29.0	35.0	34.0	30.0	6.0	18.0	25.0	3.0	11.0	7.0	16.0	6.0	12.0	11.0	9.0	6.0	12.0	6.0	12.0	6.0	9.0	5.0	4.0	8.0	2.0	6.0	6.0	2.0	6.0	4.0	3.0	6.0	
	Air Canada [South / North American]	(n=100)	44.0	17.0	33.0	12.0	21.0	7.0	5.0	20.0	3.0	6.0	1.0	6.0	4.0	5.0	11.0	5.0	9.0	4.0	3.0	2.0	3.0	2.0	3.0	2.0	3.0	4.0	1.0	1.0	1.0	4.0	2.0	2.0	20.0	
	Delta Air Lines [South / North American]	(n=100)	46.0	35.0	35.0	24.0	15.0	13.0	10.0	17.0	2.0	12.0	13.0	8.0	9.0	6.0	5.0	8.0	11.0	4.0	6.0	9.0	17.0	7.0	7.0	4.0	8.0	6.0	6.0	6.0	2.0	—	—	2.0	10.0	
	United Airlines [South / North American]	(n=100)	45.0	45.0	26.0	25.0	11.0	8.0	12.0	8.0	—	10.0	6.0	6.0	13.0	7.0	7.0	6.0	4.0	5.0	5.0	7.0	12.0	11.0	7.0	4.0	1.0	1.0	1.0	2.0	3.0	—	—	1.0	10.0	
● Jetstar [Pacific / Oceania]	Qantas [Pacific / Oceania]	(n=100)	47.0	26.0	40.0	20.0	23.0	10.0	7.0	7.0	2.0	3.0	7.0	6.0	8.0	12.0	—	2.0	6.0	8.0	2.0	3.0	9.0	5.0	3.0	2.0	3.0	2.0	2.0	2.0	6.0	2.0	2.0	2.0	13.0	
	Jetstar [Pacific / Oceania]	(n=100)	49.0	22.0	16.0	12.0	4.0	10.0	16.0	7.0	32.0	8.0	2.0	—	4.0	8.0	1.0	1.0	2.0	1.0	2.0	11.0	—	—	5.0	—	4.0	—	—	1.0	—	1.0	4.0	1.0	4.0	12.0
	Air New Zealand [Pacific / Oceania]	(n=100)	60.0	23.0	43.0	19.0	32.0	11.0	7.0	10.0	—	5.0	11.0	11.0	4.0	9.0	14.0	13.0	16.0	8.0	11.0	3.0	7.0	6.0	2.0	3.0	3.0	7.0	7.0	3.0	2.0	1.0	5.0	10.0	10.0	
Hawaiian Airlines [Pacific / Oceania]	(n=100)	57.0	31.0	28.0	13.0	28.0	15.0	11.0	3.0	—	8.0	6.0	6.0	14.0	4.0	3.0	2.0	2.0	4.0	4.0	4.0	2.0	4.0	4.0	3.0	2.0	1.0	1.0	—	3.0	3.0	2.0	1.0	10.0		
● Asiana Airlines [Asian]	Asiana Airlines [Asian]	(n=100)	38.0	44.0	18.0	14.0	18.0	17.0	9.0	9.0	8.0	11.0	5.0	7.0	12.0	6.0	11.0	6.0	2.0	6.0	5.0	7.0	5.0	6.0	2.0	7.0	5.0	4.0	2.0	4.0	4.0	2.0	2.0	4.0		
	● AirAsia X [Asian]	(n=100)	55.0	41.0	12.0	4.0	2.0	16.0	22.0	9.0	52.0	11.0	—	2.0	9.0	2.0	2.0	2.0	—	1.0	2.0	11.0	—	1.0	7.0	2.0	3.0	—	1.0	—	—	2.0	3.0	7.0		
	Eva Air [Asian]	(n=100)	53.0	33.0	36.0	7.0	22.0	17.0	11.0	4.0	7.0	15.0	13.0	12.0	8.0	4.0	13.0	9.0	3.0	14.0	3.0	4.0	9.0	5.0	4.0	3.0	6.0	4.0	4.0	2.0	2.0	2.0	2.0	8.0		
	Garuda Indonesia [Asian]	(n=100)	65.0	26.0	17.0	16.0	22.0	8.0	4.0	4.0	—	10.0	8.0	7.0	6.0	8.0	9.0	3.0	4.0	4.0	6.0	1.0	3.0	4.0	1.0	5.0	2.0	5.0	2.0	1.0	2.0	1.0	2.0	17.0		
	Cathay Pacific Airways [Asian]	(n=100)	56.0	33.0	43.0	26.0	12.0	9.0	13.0	9.0	—	10.0	16.0	11.0	10.0	6.0	8.0	13.0	8.0	4.0	7.0	7.0	5.0	5.0	4.0	6.0	2.0	5.0	5.0	5.0	—	3.0	—	9.0		
	Singapore Airlines [Asian]	(n=100)	47.0	24.0	53.0	27.0	13.0	8.0	3.0	14.0	2.0	9.0	24.0	16.0	8.0	4.0	6.0	12.0	8.0	3.0	11.0	—	4.0	3.0	3.0	8.0	2.0	10.0	7.0	1.0	2.0	2.0	1.0	10.0		
	● Scoot [Asian]	(n=100)	49.0	38.0	5.0	2.0	2.0	9.0	27.0	1.0	40.0	13.0	—	—	4.0	4.0	—	5.0	2.0	—	4.0	10.0	—	6.0	3.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	2.0	11.0		
	● Cebu Pacific Air [Asian]	(n=100)	51.0	37.0	14.0	9.0	10.0	11.0	17.0	9.0	38.0	12.0	5.0	3.0	5.0	4.0	3.0	8.0	3.0	—	4.0	12.0	3.0	6.0	12.0	3.0	6.0	4.0	2.0	4.0	2.0	3.0	2.0	4.0	5.0	
	Korean Air [Asian]	(n=100)	31.0	36.0	22.0	10.0	15.0	14.0	10.0	8.0	3.0	12.0	5.0	15.0	13.0	6.0	3.0	2.0	2.0	4.0	5.0	3.0	3.0	6.0	4.0	1.0	—	2.0	—	1.0	1.0	1.0	4.0	19.0		
	● Tigerair Taiwan [Asian]	(n=100)	53.0	44.0	6.0	4.0	10.0	18.0	19.0	4.0	45.0	8.0	4.0	1.0	2.0	4.0	—	1.0	1.0	1.0	12.0	1.0	—	7.0	—	—	—	2.0	1.0	—	—	2.0	2.0	8.0		
Thai Airways [Asian]	(n=100)	55.0	40.0	38.0	20.0	31.0	11.0	7.0	9.0	3.0	11.0	16.0	13.0	20.0	6.0	11.0	11.0	7.0	4.0	4.0	2.0	8.0	3.0	3.0	4.0	1.0	6.0	2.0	3.0	—	5.0	1.0	10.0			
● Jeju Air [Asian]	(n=100)	50.0	42.0	11.0	8.0	9.0	14.0	18.0	2.0	49.0	14.0	1.0	—	6.0	3.0	—	1.0	—	6.0	—	13.0	1.0	—	5.0	—	—	1.0	2.0	—	1.0	2.0	—	1.0	4.0	6.0	
● China Airlines [Asian]	China Airlines [Asian]	(n=100)	51.0	39.0	19.0	9.0	13.0	14.0	14.0	8.0	3.0	9.0	4.0	4.0	9.0	8.0	4.0	—	2.0	9.0	1.0	2.0	4.0	4.0	6.0	5.0	1.0	2.0	1.0	2.0	4.0	4.0	3.0	9.0		
	Air China [Asian]	(n=100)	40.0	33.0	10.0	11.0	14.0	14.0	19.0	13.0	3.0	9.0	5.0	3.0	7.0	3.0	13.0	2.0	4.0	4.0	1.0	12.0	7.0	7.0	3.0	3.0	—	2.0	1.0	3.0	2.0	2.0	4.0	10.0		
	China Eastern Airlines [Asian]	(n=100)	41.0	24.0	3.0	3.0	11.0	7.0	12.0	5.0	3.0	8.0	1.0	1.0	7.0	5.0	5.0	1.0	1.0	1.0	1.0	1.0	8.0	2.0	2.0	2.0	2.0	2.0	1.0	5.0	3.0	—	4.0	25.0		
	TWY Airlines [Asian]	(n=100)	60.0	38.0	7.0	2.0	6.0	16.0	27.0	2.0	50.0	9.0	2.0	—	7.0	5.0	—	1.0	—	3.0	—	6.0	—	1.0	7.0	—	1.0	2.0	2.0	—	4.0	2.0	—	9.0		
● Philippines Airlines [Asian]	Philippines Airlines [Asian]	(n=100)	60.0	28.0	12.0	10.0	18.0	8.0	7.0	6.0	5.0	9.0	5.0	4.0	6.0	6.0	2.0	2.0	3.0	3.0	2.0	5.0	4.0	1.0	11.0	2.0	2.0	2.0	—	1.0	2.0	1.0	4.0	12.0		
	Vietnam Airlines [Asian]	(n=100)	51.0	20.0	16.0	6.0	15.0	8.0	11.0	8.0	1.0	7.0	2.0	4.0	4.0	12.0	3.0	4.0	5.0	5.0	3.0	5.0	3.0	3.0	2.0	—	1.0	1.0	2.0	1.0	3.0	1.0	3.0	16.0		
	Malaysia Airlines [Asian]	(n=100)	45.0	37.0	19.0	13.0	16.0	10.0	17.0	23.0	1.0	7.0	7.0	5.0	6.0	10.0	16.0	8.0	1.0	4.0	10.0	2.0	7.0	6.0	6.0	9.0	2.0	1.0	2.0	5.0	3.0	—	11.0			
	Allitalia [European]	(n=100)	43.0	18.0	13.0	15.0	19.0	6.0	3.0	5.0	1.0	7.0	7.0	4.0	1.0	11.0	3.0	3.0	2.0	5.0	4.0	3.0	3.0	1.0	6.0	3.0	2.0	1.0	2.0	2.0	6.0	2.0	3.0	28.0		
	Air France [European]	(n=100)	48.0	41.0	33.0	31.0	23.0	12.0	5.0	18.0	1.0	18.0	9.0	21.0	7.0	11.0	9.0	9.0	12.0	6.0	7.0	2.0	3.0	4.0	8.0	4.0	2.0	6.0	4.0	—	1.0	—	4.0	9.0		
KLM Royal Dutch Airlines [European]	KLM Royal Dutch Airlines [European]	(n=100)	25.0	29.0	36.0	21.0	13.0	10.0	6.0	21.0	1.0	18.0	10.0	11.0	8.0	8.0	9.0	10.0	7.0	8.0	5.0	4.0	5.0	5.0	5.0	—	5.0	4.0	9.0	5.0	1.0	3.0	23.0			
	Turkish Airlines [European																																			

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



Sample		(%)														
Total (n=4,000)		13.0	12.3	7.6	5.6	4.1	3.6	3.3	3.2	3.1	2.9	2.5	1.3	0.1	74.1	
By airline	ANA [Japanese]	(n=100)	15.0	16.0	13.0	12.0	4.0	8.0	2.0	3.0	4.0	6.0	7.0	4.0	—	66.0
	JAL [Japanese]	(n=100)	15.0	10.0	6.0	7.0	2.0	6.0	8.0	2.0	6.0	8.0	2.0	1.0	—	75.0
	● Peach Aviation [Japanese]	(n=100)	18.0	22.0	9.0	5.0	11.0	4.0	1.0	5.0	—	—	1.0	1.0	—	55.0
	American Airlines [South / North American]	(n=100)	13.0	12.0	16.0	12.0	10.0	4.0	8.0	4.0	5.0	3.0	3.0	2.0	—	70.0
	Air Canada [South / North American]	(n=100)	7.0	12.0	3.0	3.0	5.0	1.0	3.0	3.0	1.0	2.0	—	—	—	80.0
	Delta Air Lines [South / North American]	(n=100)	3.0	6.0	5.0	6.0	2.0	1.0	6.0	5.0	4.0	2.0	2.0	—	—	88.0
	United Airlines [South / North American]	(n=100)	10.0	7.0	2.0	4.0	2.0	4.0	3.0	3.0	—	2.0	2.0	—	—	82.0
	Qantas [Pacific / Oceania]	(n=100)	11.0	12.0	14.0	9.0	6.0	9.0	6.0	7.0	5.0	9.0	3.0	1.0	—	69.0
	● Jetstar [Pacific / Oceania]	(n=100)	24.0	37.0	26.0	18.0	9.0	2.0	5.0	1.0	14.0	9.0	2.0	1.0	—	43.0
	Air New Zealand [Pacific / Oceania]	(n=100)	16.0	14.0	9.0	10.0	8.0	3.0	4.0	9.0	6.0	5.0	8.0	4.0	—	73.0
	Hawaiian Airlines [Pacific / Oceania]	(n=100)	6.0	6.0	4.0	3.0	2.0	2.0	3.0	11.0	4.0	3.0	2.0	—	—	77.0
	Asiana Airlines [Asian]	(n=100)	11.0	12.0	4.0	6.0	3.0	4.0	4.0	2.0	1.0	3.0	3.0	2.0	—	80.0
	● AirAsia X [Asian]	(n=100)	32.0	33.0	26.0	10.0	11.0	2.0	2.0	4.0	1.0	—	1.0	—	—	37.0
	Eva Air [Asian]	(n=100)	15.0	8.0	5.0	3.0	2.0	2.0	3.0	2.0	—	2.0	3.0	—	—	77.0
	Garuda Indonesia [Asian]	(n=100)	5.0	7.0	3.0	2.0	2.0	2.0	3.0	1.0	2.0	2.0	1.0	3.0	—	89.0
	Cathay Pacific Airways [Asian]	(n=100)	6.0	7.0	5.0	4.0	—	1.0	1.0	—	1.0	—	—	—	—	86.0
	Singapore Airlines [Asian]	(n=100)	17.0	11.0	9.0	9.0	3.0	3.0	4.0	1.0	4.0	2.0	7.0	2.0	—	71.0
	● Scoot [Asian]	(n=100)	32.0	25.0	15.0	10.0	9.0	2.0	2.0	6.0	—	—	1.0	—	—	46.0
	● Cebu Pacific Air [Asian]	(n=100)	28.0	30.0	16.0	10.0	16.0	9.0	3.0	7.0	4.0	5.0	6.0	3.0	—	47.0
	Korean Air [Asian]	(n=100)	7.0	7.0	6.0	—	2.0	2.0	1.0	1.0	1.0	2.0	3.0	—	—	86.0
	● Tigerair Taiwan [Asian]	(n=100)	16.0	30.0	7.0	2.0	8.0	4.0	2.0	2.0	1.0	—	2.0	—	—	55.0
	Thai Airways [Asian]	(n=100)	7.0	5.0	4.0	5.0	2.0	4.0	4.0	—	5.0	4.0	4.0	2.0	—	87.0
	● Jeju Air [Asian]	(n=100)	15.0	23.0	—	3.0	8.0	6.0	—	1.0	—	—	—	—	1.0	60.0
	China Airlines [Asian]	(n=100)	7.0	8.0	5.0	8.0	2.0	4.0	4.0	1.0	—	1.0	3.0	—	—	82.0
	Air China [Asian]	(n=100)	9.0	5.0	2.0	1.0	—	2.0	—	1.0	3.0	3.0	1.0	1.0	—	88.0
	China Eastern Airlines [Asian]	(n=100)	6.0	7.0	2.0	2.0	2.0	2.0	—	—	—	1.0	—	—	—	89.0
	● TWay Airlines [Asian]	(n=100)	11.0	15.0	3.0	1.0	5.0	—	—	1.0	—	—	—	—	—	73.0
	Philippines Airlines [Asian]	(n=100)	17.0	11.0	7.0	5.0	5.0	4.0	3.0	2.0	3.0	4.0	—	3.0	—	73.0
	Vietnam Airlines [Asian]	(n=100)	10.0	11.0	6.0	6.0	1.0	2.0	—	—	2.0	1.0	—	1.0	—	82.0
	Malaysia Airlines [Asian]	(n=100)	18.0	8.0	10.0	4.0	1.0	—	3.0	2.0	4.0	4.0	3.0	2.0	—	75.0
	Alitalia [European]	(n=100)	4.0	4.0	3.0	2.0	1.0	5.0	2.0	4.0	2.0	2.0	2.0	2.0	—	88.0
	Air France [European]	(n=100)	24.0	5.0	11.0	7.0	4.0	2.0	7.0	5.0	7.0	6.0	5.0	5.0	—	71.0
	KLM Royal Dutch Airlines [European]	(n=100)	23.0	9.0	10.0	9.0	1.0	5.0	2.0	8.0	5.0	5.0	4.0	—	—	67.0
	Turkish Airlines [European]	(n=100)	6.0	4.0	4.0	2.0	2.0	4.0	3.0	2.0	4.0	3.0	3.0	2.0	1.0	87.0
	Finnair [European]	(n=100)	8.0	5.0	3.0	2.0	—	4.0	3.0	4.0	2.0	2.0	1.0	—	—	80.0
	British Airways [European]	(n=100)	11.0	8.0	4.0	2.0	2.0	4.0	5.0	6.0	2.0	—	5.0	—	—	74.0
	Lufthansa [European]	(n=100)	11.0	10.0	8.0	5.0	—	4.0	1.0	1.0	3.0	5.0	1.0	2.0	—	84.0
	Etihad Airways [Middle East / Africa]	(n=100)	16.0	16.0	14.0	9.0	8.0	12.0	11.0	9.0	11.0	8.0	7.0	6.0	—	74.0
	Emirates [Middle East / Africa]	(n=100)	6.0	8.0	2.0	2.0	3.0	2.0	6.0	2.0	3.0	1.0	1.0	—	—	86.0
	Qatar Airways [Middle East / Africa]	(n=100)	3.0	5.0	4.0	2.0	—	2.0	3.0	1.0	2.0	1.0	2.0	—	—	92.0

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

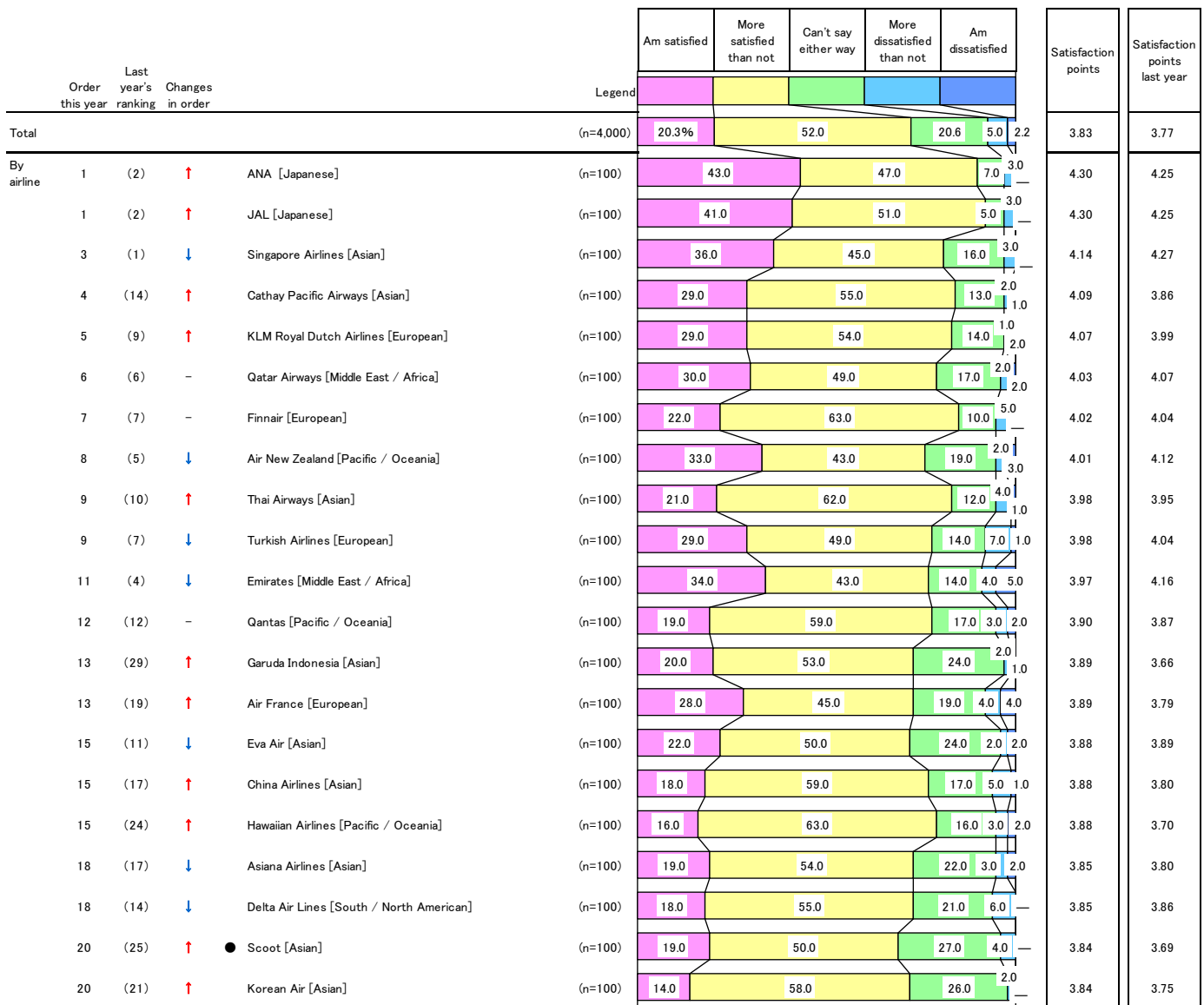
## **Part 2: Airline Evaluations**



# 1. Overall Satisfaction: Top 20

- The overall satisfaction score average was 3.83pt among the total.
- All Nippon Airways (ANA) and Japan Airlines (JAL) both scored 4.30pt, moving from 2nd place last year to the top position this time. This was followed by Singapore Airlines (4.14pt).
- Cathay Pacific (4.09pt) moved from 14th place last year to 4th place this time, while Garuda Indonesian Airlines (3.89pt) moved up to 13th place from 29th place the previous year.

## ■ 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.

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

## 2. Satisfaction with LCC

- The overall LCC satisfaction score average was 3.72pt.
- Scoot's score of 3.84pt moved it to the top spot from 4th place last year. T'way Air and Peach Aviation followed with a 3.82pt tie.

### ■ Overall satisfaction with LCC (Total / Single Answer)

	Order this year	Last year's ranking	Changes in order		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=800)	13.9%	55.1	23.3	4.8	3.0	3.72	3.68
By airline	1	(4)	↑	● Scoot [Asian]	(n=100)	19.0	50.0	27.0	4.0	3.0	3.84	3.69
	2	(8)	↑	● T'Way Airlines [Asian]	(n=100)	15.0	59.0	21.0	3.0	2.0	3.82	3.52
	2	(2)	-	● Peach Aviation [Japanese]	(n=100)	16.0	56.0	23.0	4.0	1.0	3.82	3.72
	4	(5)	↑	● Jeju Air [Asian]	(n=100)	10.0	65.0	20.0	2.0	3.0	3.77	3.67
	5	(5)	-	● Tigerair Taiwan [Asian]	(n=100)	14.0	53.0	29.0	3.0	1.0	3.76	3.67
	6	*	*	● Cebu Pacific Air [Asian]	(n=100)	15.0	53.0	23.0	4.0	5.0	3.69	*
	7	(7)	-	● AirAsia X [Asian]	(n=100)	12.0	51.0	24.0	8.0	5.0	3.57	3.63
	8	(3)	↓	● Jetstar [Pacific / Oceania]	(n=100)	10.0	54.0	19.0	10.0	7.0	3.50	3.71

† 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.

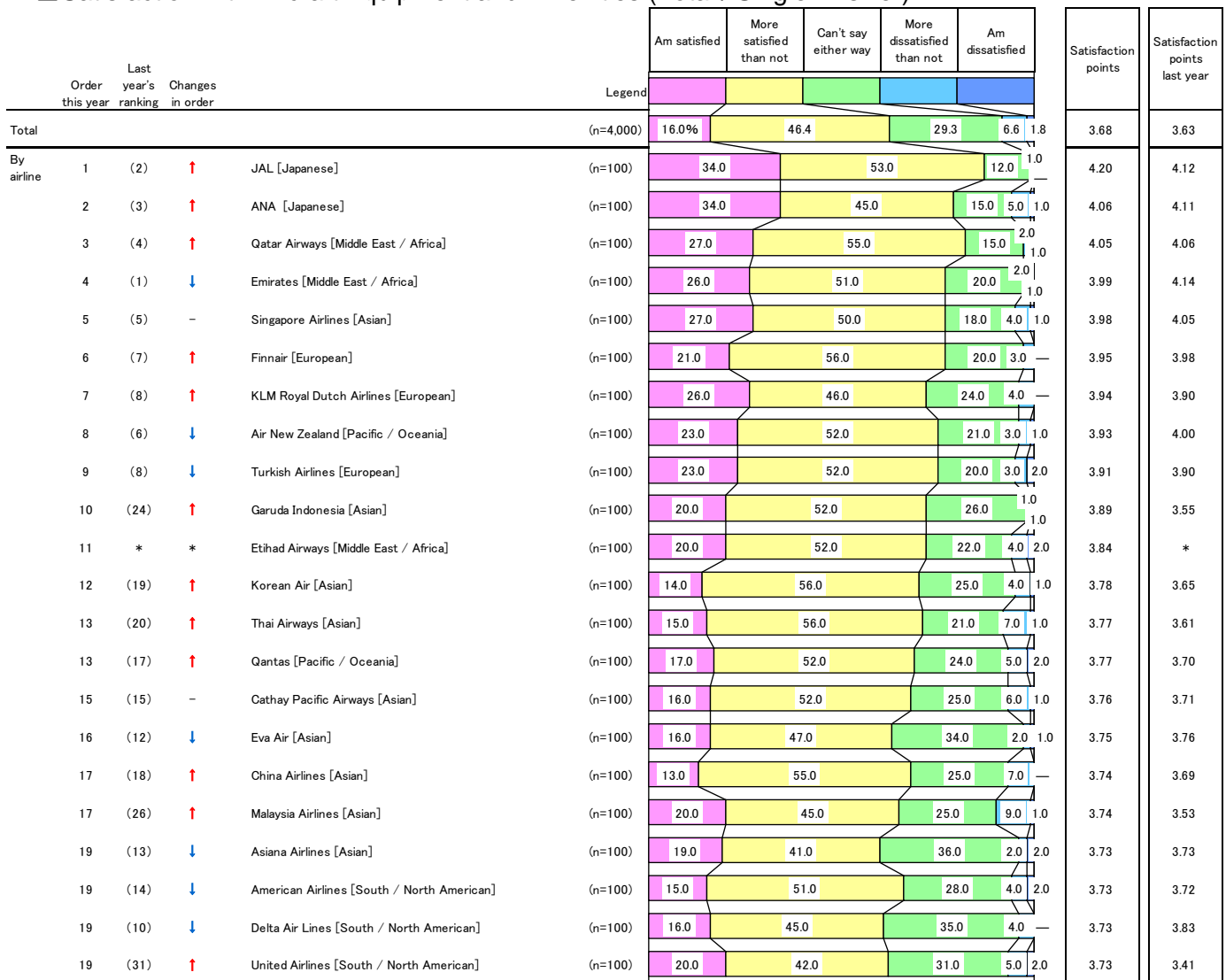
† "●" indicates a low-cost carrier (LCC)

### 3. Satisfaction by Attribute

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

- The overall average score for satisfaction with "aircraft equipment and facilities" was 3.68pt.
- A score of 4.20pt was enough to move Japan Airlines (JAL) to the top spot from 2nd place last year. Second place was All Nippon Airways (ANA) (4.06pt). This was followed by Qatar Airways (4.05pt), ranked 3rd.
- Garuda Indonesia (3.89pt) moved from 24th place last year to 10th place this time, while Malaysia Airlines (3.74pt) went up in ranking to 17th place from 26th place last year. United (3.73pt) rose sharply from 31st place last year to 19th place this time.
- The top reasons for satisfaction and dissatisfaction were "The aircraft is new/nice" and "Seat width/comfort"

#### ■ 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/cleanliness 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	2,494	41.4	39.9	30.1	12.1	22.3	13.7	0.9	18.8
Reasons for dissatisfaction	1,506	16.8	32.9	9.2	9.8	13.2	9.8	2.3	39.2

† "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."

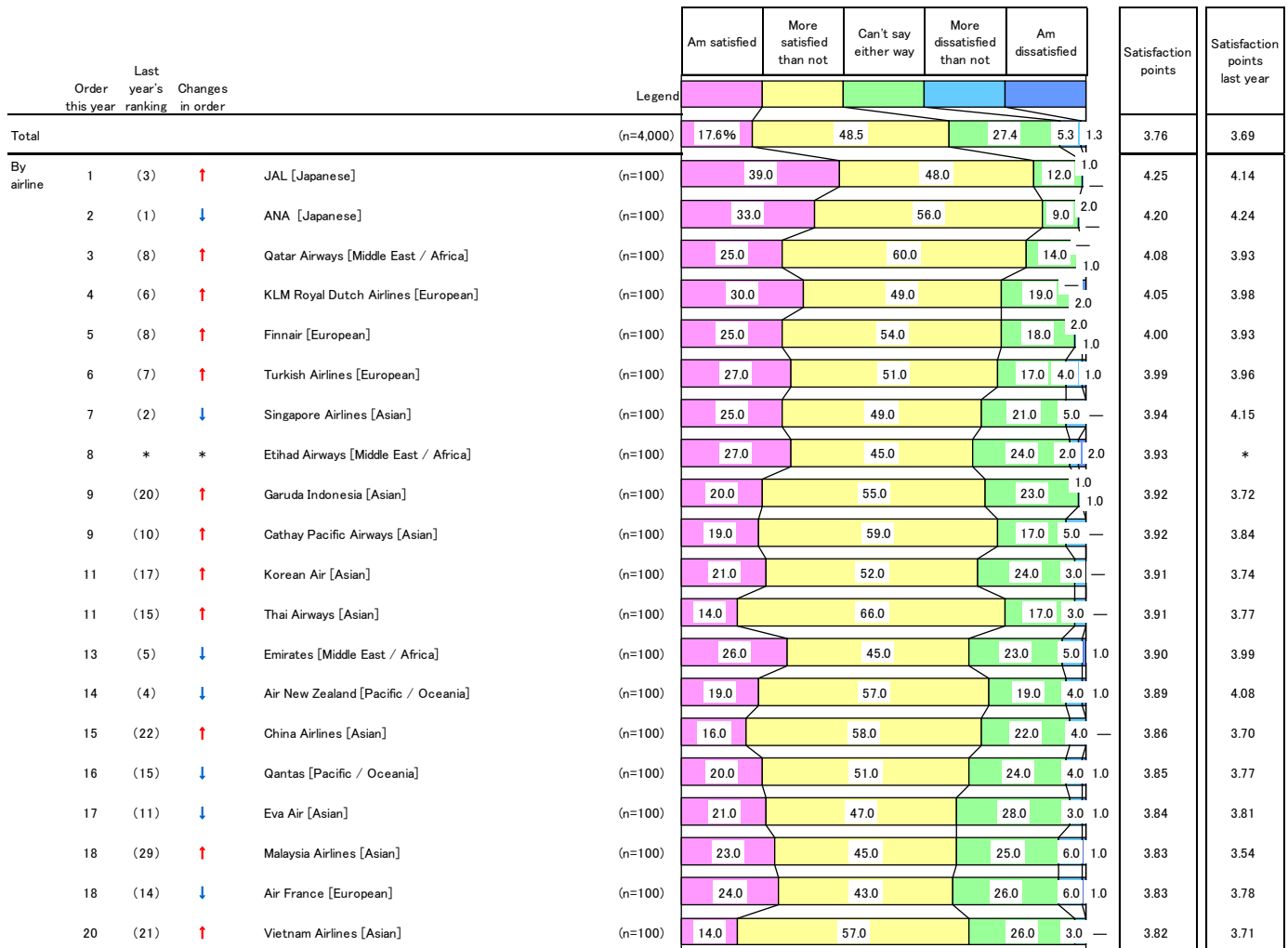


### 3. Satisfaction by Attribute

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

- The overall average satisfaction score for "Customer service by cabin crew" was 3.76pt
- Japan Airlines (JAL) came out on top with a score of 4.25pt, up from 3rd place last year. All Nippon Airways (ANA) (4.20pt) and Qatar Airways (4.08pt) followed.
- Garuda Indonesia (3.92pt) shot up to 9th place from 20th place last year, while Malaysia Airlines (3.83pt) saw a significant increase in ranking, moving from 29th in the previous year to 18th this time.
- The dominant reason for both satisfaction and dissatisfaction was "Couteousness of the service."

#### ■ 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	2,641	23.1	52.2	24.1	16.0	46.6	22.7	10.4	0.3	11.3
Reasons for dissatisfaction	1,359	9.0	20.1	7.4	14.0	13.2	15.3	3.2	2.1	46.1

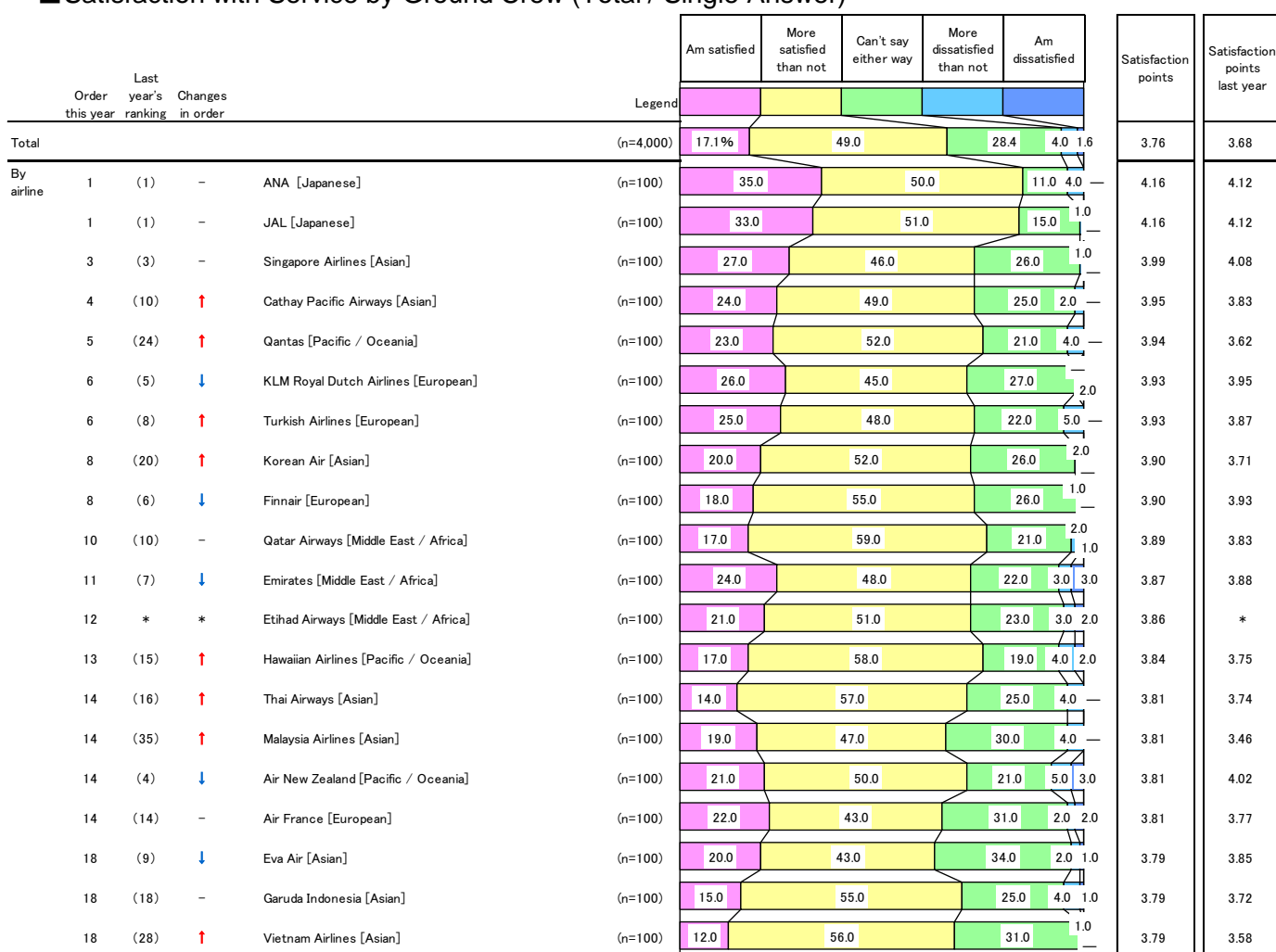
† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."  
 † "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

### 3. Satisfaction by Attribute

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

- The overall average satisfaction score for "Customer service by the airline ground crew at the airport" was 3.76pt.
- As was the case last year, All Nippon Airways (ANA) and Japan Airlines (JAL) were the top-ranked Japanese companies and shared the same score (4.16pt). Singapore Airlines (3.99pt) was ranked 3rd.
- Qantas (3.94pt) moved from 24th place last year to 5th place this time, while Korean Air (3.90pt) saw sharp increases: 8th place from 20th place, respectively. Malaysia Airlines (3.81pt) shot up to 14th place from 35th place last year.
- The dominant reason for both satisfaction and dissatisfaction was "Smoothness of check-in/checking bags."

#### ■ 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	2,643	68.7	33.6	18.2	6.2	0.8	20.3
Reasons for dissatisfaction	1,357	25.3	13.0	6.9	2.4	3.5	58.6

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

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

### 3. Satisfaction by Attribute

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

- The overall average satisfaction score for "In-flight food and drink service" was 3.66pt
- All Nippon Airways (ANA) shot to the top with 4.03pt, up from 7th place last year. Qatar Airways and Japan Airlines (JAL) were tied in 2nd place with the identical score (4.02pt).
- By far, the dominant reason for satisfaction and dissatisfaction was "The taste of the food."

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

Order this year	Last year's ranking	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			
<b>Total</b> (n=3,674)					17.2%	45.4		26.3	8.6	2.6	3.66	3.59
1	(7)	↑	ANA [Japanese]	(n=100)	30.0	49.0		16.0	4.0	1.0	4.03	3.95
2	(7)	↑	Qatar Airways [Middle East / Africa]	(n=100)	24.0	59.0		13.0	3.0	1.0	4.02	3.95
2	(5)	↑	JAL [Japanese]	(n=100)	31.0	47.0		16.0	5.0	1.0	4.02	3.97
4	(2)	↓	Turkish Airlines [European]	(n=100)	30.0	49.0		13.0	6.0	2.0	3.99	4.09
5	(9)	↑	KLM Royal Dutch Airlines [European]	(n=100)	24.0	50.0		24.0	1.0	1.0	3.95	3.82
6	(11)	↑	Cathay Pacific Airways [Asian]	(n=100)	20.0	58.0		17.0	5.0	—	3.93	3.75
6	(1)	↓	Emirates [Middle East / Africa]	(n=100)	27.0	47.0		20.0	4.0	2.0	3.93	4.11
8	(4)	↓	Singapore Airlines [Asian]	(n=100)	26.0	46.0		20.0	8.0	—	3.90	4.00
9	(3)	↓	Air New Zealand [Pacific / Oceania]	(n=100)	22.0	52.0		20.0	5.0	1.0	3.89	4.04
10	(9)	↓	Air France [European]	(n=100)	26.0	46.0		21.0	3.0	4.0	3.87	3.82
11	(21)	↑	Korean Air [Asian]	(n=100)	26.0	42.0		25.0	6.0	1.0	3.86	3.52
12	(23)	↑	Malaysia Airlines [Asian]	(n=100)	21.0	48.0		25.0	6.0	—	3.84	3.50
13	(12)	↓	Thai Airways [Asian]	(n=100)	16.0	60.0		16.0	7.0	1.0	3.83	3.74
14	(5)	↓	Finnair [European]	(n=100)	21.0	46.0		28.0	4.0	1.0	3.82	3.97
15	(13)	↓	China Airlines [Asian]	(n=100)	15.0	57.0		21.0	5.0	2.0	3.78	3.73
16	(19)	↑	Vietnam Airlines [Asian]	(n=100)	12.0	59.0		23.0	5.0	1.0	3.76	3.57
17	(18)	↑	Qantas [Pacific / Oceania]	(n=100)	19.0	48.0		26.0	3.0	4.0	3.75	3.59
17	*	*	Etihad Airways [Middle East / Africa]	(n=100)	27.0	36.0		24.0	11.0	2.0	3.75	*
19	(23)	↑	Garuda Indonesia [Asian]	(n=100)	18.0	49.0		20.0	12.0	1.0	3.71	3.50
20	(15)	↓	Eva Air [Asian]	(n=100)	19.0	44.0		26.0	10.0	1.0	3.70	3.68
20	(27)	↑	Hawaiian Airlines [Pacific / Oceania]	(n=100)	11.0	57.0		25.0	5.0	2.0	3.70	3.43

† 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.

† Tabulations were done without the data of LCC with less than 80 users: AirAsia X, Scoot, Cebu Pacific Air, Tigerair Taiwan, Jeju Air, T'way Air, Jetstar, 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	2,298	66.0	41.3	23.7	25.3	30.1	31.7	29.0	0.7	5.9
Reasons for dissatisfaction	1,376	45.9	12.9	23.0	7.9	4.5	7.6	12.4	2.8	27.2

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

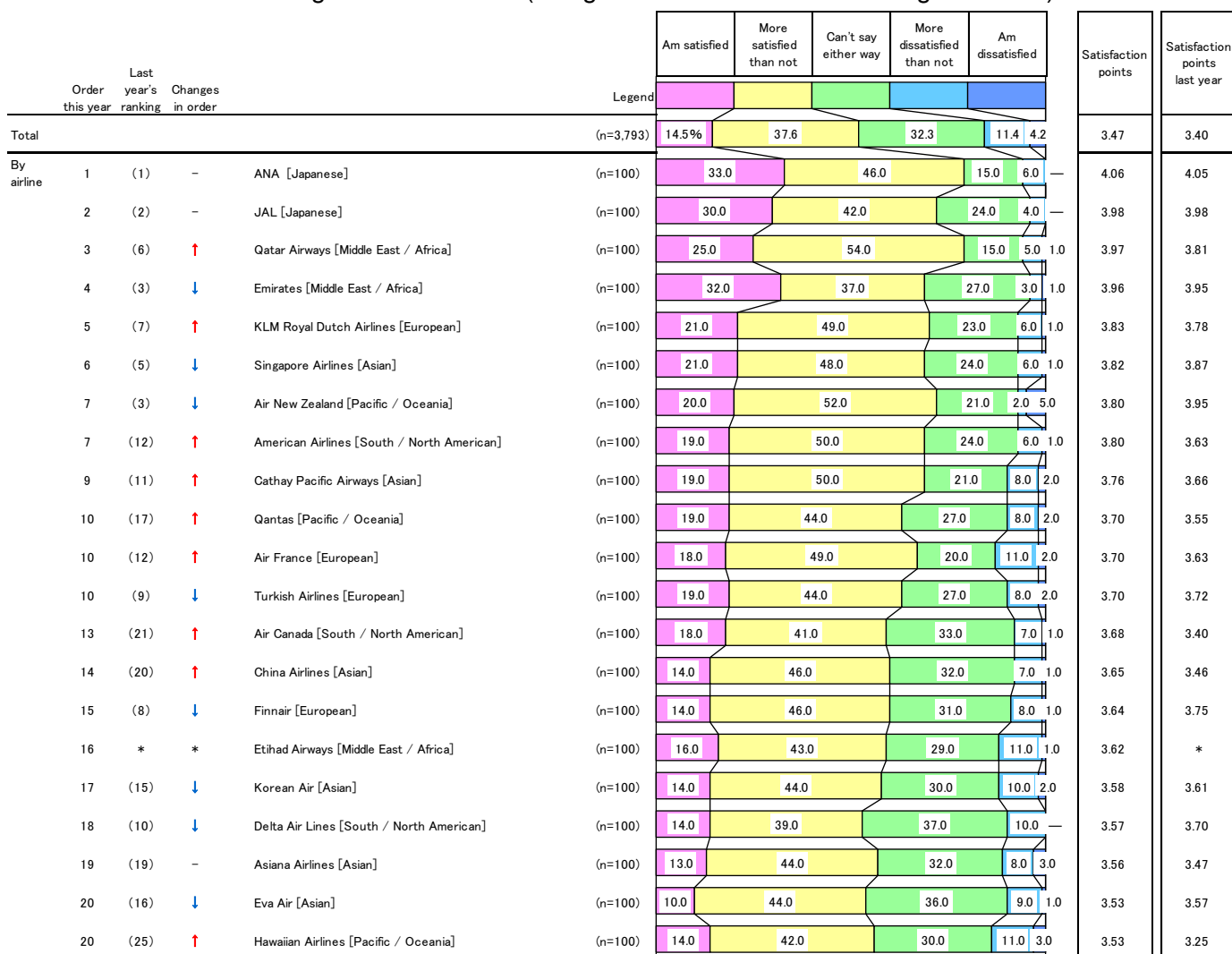
† "Reasons for dissatisfaction" were asked to those who gave "Can't say either way", "More dissatisfied than not" or "Am dissatisfied."

### 3. Satisfaction by Attribute

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

- The satisfaction score for "In-flight entertainment" averaged 3.47pt, which made it the lowest score across all five categories.
- As was the case last year, All Nippon Airways (ANA) continued to lead with a score 4.06pt from last year. Japan Airlines (JAL) (3.98pt) and Qatar Airways (3.97pt) followed.
- The dominant reasons for satisfaction and dissatisfaction were "Number of movie/TV channels," "Movie/TV program content." and "Availability of Japanese language support."

#### ■ 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.

† Tabulations were done without the data of LCC with less than 80 users: AirAsia X, Scoot, Cebu Pacific Air, Tigerair Taiwan, Jeju Air, T'way 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	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	1,975	42.1	43.7	35.6	13.3	10.8	17.0	6.8	11.0	6.6	3.6	3.6	2.3	9.4	4.3	0.5	14.1
Reasons for dissatisfaction	1,818	17.4	23.2	26.6	5.4	5.6	13.1	3.5	4.8	4.2	1.4	2.3	1.4	7.3	2.7	3.0	35.7

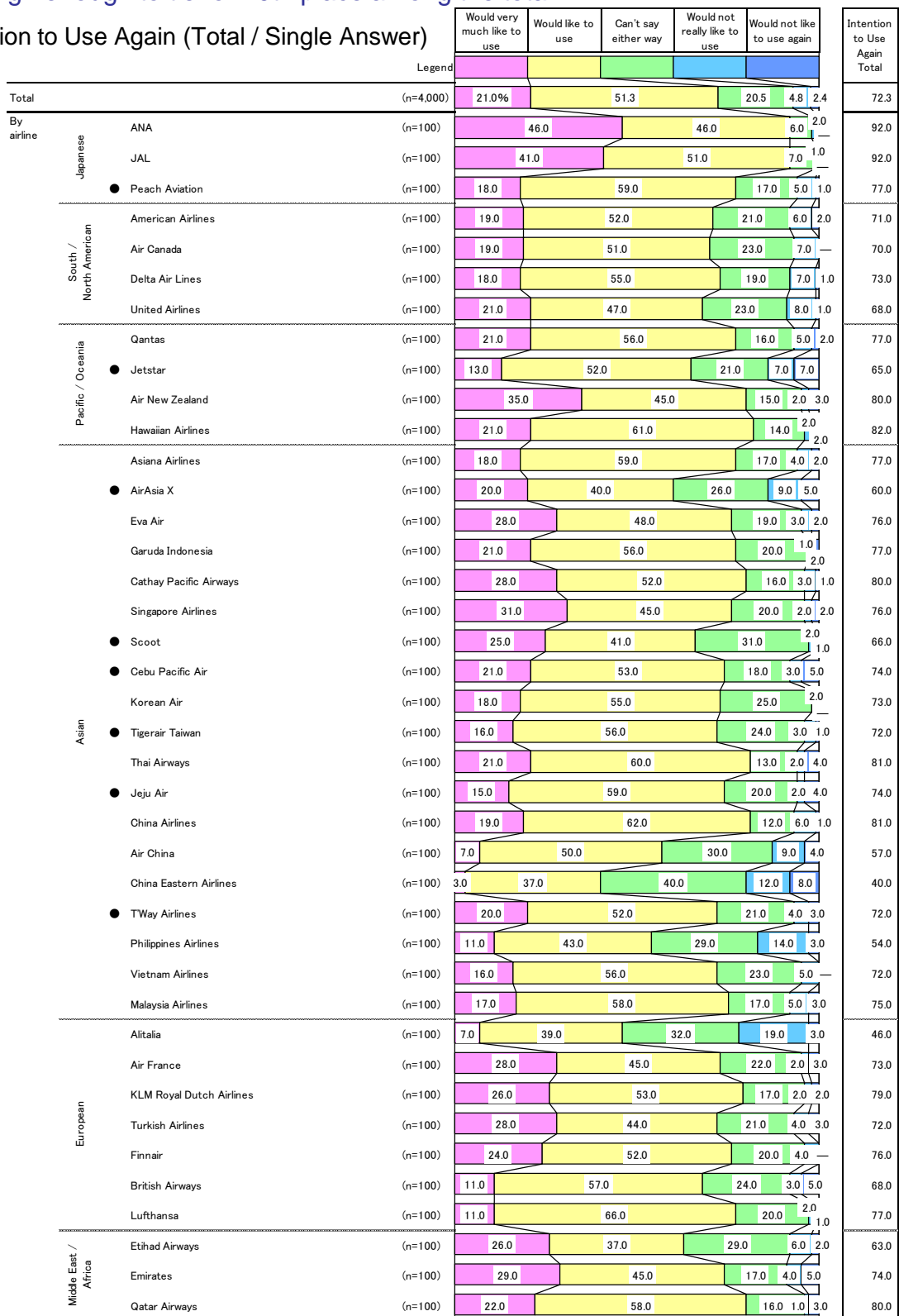
† "Reasons for satisfaction" were asked to those who gave "Am satisfied" or "More satisfied than not."

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

## 4. Intention to Use Again

- Respondents who indicated an intention to use again by answering “definitely want to use” accounted for 21%. Factoring in those who answered “want to use,” the total score for intention to use again was 72.3%
- By airline, All Nippon Airways (ANA) and Japan Airlines (JAL) tied for the highest total score for intention to use again at 92%. These were followed by Hawaiian Airlines (82%).
- Among LCCs, Peach Aviation had a total score for intention to use again of 77%, which was high enough to tie for 10th place among the total.

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



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

## 5. Airlines Desired for Future Use

● When asked about the airlines they would like to use in the future, respondents who answered All Nippon Airways (ANA) accounted for 63.6%, making it the top choice, as was the case last year. Japan Airlines (JAL) was selected by 52.1%, an indication that the two Japanese companies maintained high usage intention scores.

● Among the LCCs, Peach Aviation ranked 6th with a score of 5.6%.

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

		0	10	20	30	40	50	60	70	2020 Survey (n=4,000)	(%)	2019 Survey Ranking (n=4,000)	Rate of increase	
1	ANA [Japanese]									n=2,544	63.6	1	62.2	↑
2	JAL [Japanese]									n=2,083	52.1	2	50.1	↑
3	Singapore Airlines [Asian]									n=770	19.3	3	18.1	↑
4	Emirates [Middle East / Africa]									n=584	14.6	4	13.3	↑
5	Air France [European]									n=234	5.9	6	5.8	—
6	● Peach Aviation [Japanese]									n=222	5.6	5	6.2	—
7	Lufthansa [European]									n=221	5.5	9	4.9	—
8	Delta Air Lines [South / North American]									n=195	4.9	8	5.1	—
9	Cathay Pacific Airways [Asian]									n=189	4.7	7	5.6	—
10	Qatar Airways [Middle East / Africa]									n=177	4.4	13	3.8	—
11	Thai Airways [Asian]									n=173	4.3	15	3.7	—
	Finnair [European]									n=173	4.3	16	3.7	—
13	Hawaiian Airlines [Pacific / Oceania]									n=163	4.1	14	3.8	—
14	United Airlines [South / North American]									n=156	3.9	11	4.1	—
15	KLM Royal Dutch Airlines [European]									n=141	3.5	12	3.9	—
16	Skymark									n=137	3.4	*	*	*
17	Qantas [Pacific / Oceania]									n=118	3.0	18	2.5	—
18	Air New Zealand [Pacific / Oceania]									n=117	2.9	17	3.4	—
19	American Airlines [South / North American]									n=96	2.4	20	2.1	—
20	Air Canada [South / North American]									n=88	2.2	24	1.8	—
	Eva Air [Asian]									n=88	2.2	19	2.3	—
22	Turkish Airlines [European]									n=81	2.0	24	1.8	—
23	British Airways [European]									n=79	2.0	23	1.9	—
24	Ethiopian Airways [Middle East / Africa]									n=77	1.9	21	2.0	—
25	Korean Air [Asian]									n=69	1.7	26	1.7	—
26	● Spring Japan									n=58	1.5	22	2.0	—
27	Scandinavian Airlines									n=53	1.3	33	0.9	—
28	● Jetstar [Pacific / Oceania]									n=52	1.3	26	1.7	—
29	Vietnam Airlines [Asian]									n=47	1.2	35	0.8	—
30	Malaysia Airlines [Asian]									n=46	1.2	37	0.7	—
31	Asiana Airlines [Asian]									n=45	1.1	30	1.0	—
32	China Airlines [Asian]									n=43	1.1	32	0.9	—
33	Swiss International Airlines									n=38	1.0	29	1.2	—
34	● Thai AirAsia X									n=37	0.9	42	0.5	—
35	Philippines Airlines [Asian]									n=35	0.9	46	0.4	—
36	Austrian Airlines									n=34	0.9	*	*	*
37	Alitalia [European]									n=31	0.8	33	0.9	—
38	● Tigerair Taiwan [Asian]									n=29	0.7	36	0.7	—
39	● Scoot [Asian]									n=24	0.6	38	0.7	—
	Garuda Indonesia [Asian]									n=24	0.6	31	1.0	—
41	● Jeju Air [Asian]									n=23	0.6	40	0.6	—
42	● NokScoot									n=20	0.5	53	0.3	—
	● Cebu Pacific Air [Asian]									n=20	0.5	49	0.3	—
44	Air China [Asian]									n=19	0.5	45	0.4	—
	● Jetstar Asia Airways									n=19	0.5	39	0.6	—
	● AirAsia X [Asian]									n=19	0.5	28	1.4	—
47	China Eastern Airlines [Asian]									n=18	0.5	49	0.3	—
48	Air Tahiti Nui									n=17	0.4	40	0.6	—
49	Aero Mexico									n=15	0.4	44	0.4	—
50	Cathay Dragonair (formerly Hong Kong Dragonair)									n=13	0.3	43	0.5	—
51	Aeroflot									n=12	0.3	49	0.3	—
52	Air Calédonie International									n=11	0.3	66	0.1	—
53	● Air Busan									n=10	0.3	48	0.3	—
	● Thai Lion Air									n=10	0.3	52	0.3	—
55	Fiji Airways									n=9	0.2	58	0.2	—
	● Hong Kong Express Airways									n=9	0.2	53	0.3	—
57	● T'Way Airlines [Asian]									n=8	0.2	59	0.2	—
58	● Spring Airlines									n=7	0.2	56	0.2	—
	China Southern Airlines									n=7	0.2	59	0.2	—
	● Air Seoul									n=7	0.2	47	0.4	—
	● Jin Air									n=7	0.2	57	0.2	—
62	Bangkok Airways									n=6	0.2	66	0.1	—
	Ethiopian Airlines									n=6	0.2	85	—	—
	LOT Polish Airlines									n=6	0.2	59	0.2	—
	South African Airways									n=6	0.2	72	0.1	—
66	● Eastar Jet									n=4	0.1	59	0.2	—
	● VietJet Air									n=4	0.1	78	—	—
	Air Macau									n=4	0.1	59	0.2	—
	Royal Brunei Airlines									n=4	0.1	*	*	*
	Aurora Airways (Former Sakhalin Airlines, former Vladivostok Airlines)									n=4	0.1	66	0.1	—
71	Air India									n=3	0.1	66	0.1	—
72	Xiamen (Amoy) Airlines									n=2	0.1	*	*	*
	Hainan Airlines									n=2	0.1	64	0.1	—
	Juneyao Airlines									n=2	0.1	78	—	—
	Shenzhen Air									n=2	0.1	72	0.1	—
	Hong Kong Airlines									n=2	0.1	53	0.3	—
77	Air Niugini									n=1	—	66	0.1	—
	Okay Airways									n=1	—	*	*	*
	Sichuan Air									n=1	—	72	0.1	—
	Jet Airways									n=1	—	78	—	—
	Uzbekistan Airways									n=1	—	64	0.1	—
	Pakistan International Airlines									n=1	—	78	—	—
	S7 Aviation (Former Siberian Airlines)									n=1	—	78	—	—
	EgyptAir									n=1	—	78	—	—
85	Shandong Airlines									n=0	—	72	0.1	—
	Shanghai Airlines									n=0	—	72	0.1	—
	Zhejiang Loong Airlines (Loong Air)									n=0	—	*	*	*
	● China United Airlines									n=0	—	85	—	—
	SriLankan Airlines									n=0	—	66	0.1	—
	Nepal Airlines									n=0	—	*	*	*
	Miat Mongolian Airlines									n=0	—	78	—	—
	Other									n=21	0.5	—	0.7	—
	Don't know									n=232	5.8	—	7.0	—

† 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 2019 survey and 2020 survey.

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