


International Airline Image Survey Japan

■ Summary

- 90% of respondents have used an airline before; approximately 40% have flown one time or more in the past 12 months
- 72% of respondents flew for “Domestic vacations;” 57.2% flew for “Overseas vacations”
- All Nippon Airlines (#1), Japan Airlines (#2) and Singapore Airlines (#3) were the top rated airlines for each of the following attributes: “Safe/ Reliable,” “High quality service,” and “Would like to use.”
- “Reasonable price,” and “Safe/ Reliable” were given as the most important criteria when selecting an airline.

Top airlines

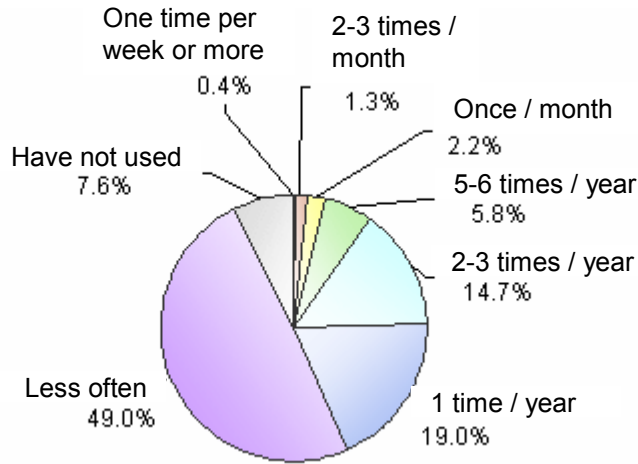


■ Background

- Methodology: Online Survey
- Timing: April 1-5, 2007
- Sample: 17,554
- Source: MyVoice Online Internet community

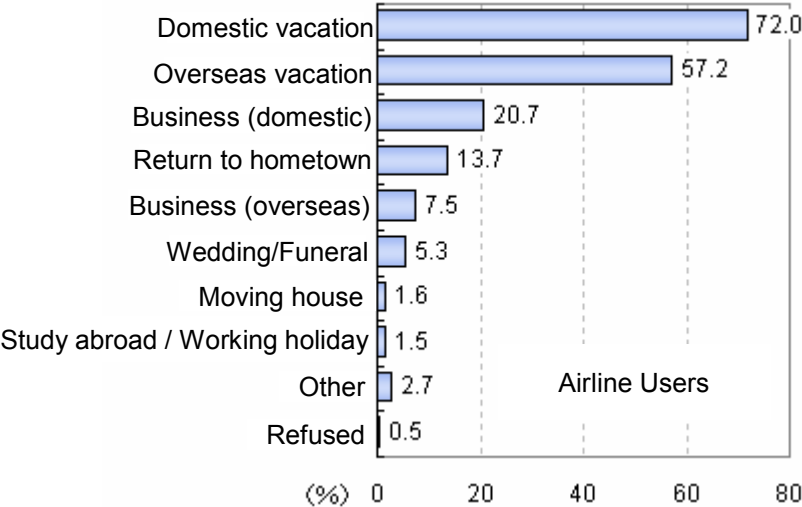
Gender	Male	Female	Total	Age	10's	20's	30's	40's	50's+	Total
Sample	8,075	9,479	17,554	Sample	398	3,240	6,860	4,545	2,511	17,554
%	46%	54%	100%	%	2%	19%	39%	26%	14%	100%

1. **Airline usage frequency** (All respondents)
 “How frequently do you fly on commercial airlines?”



- More than 90% have used an airline in the past. More than 40% of respondents fly at least once per year or more often.

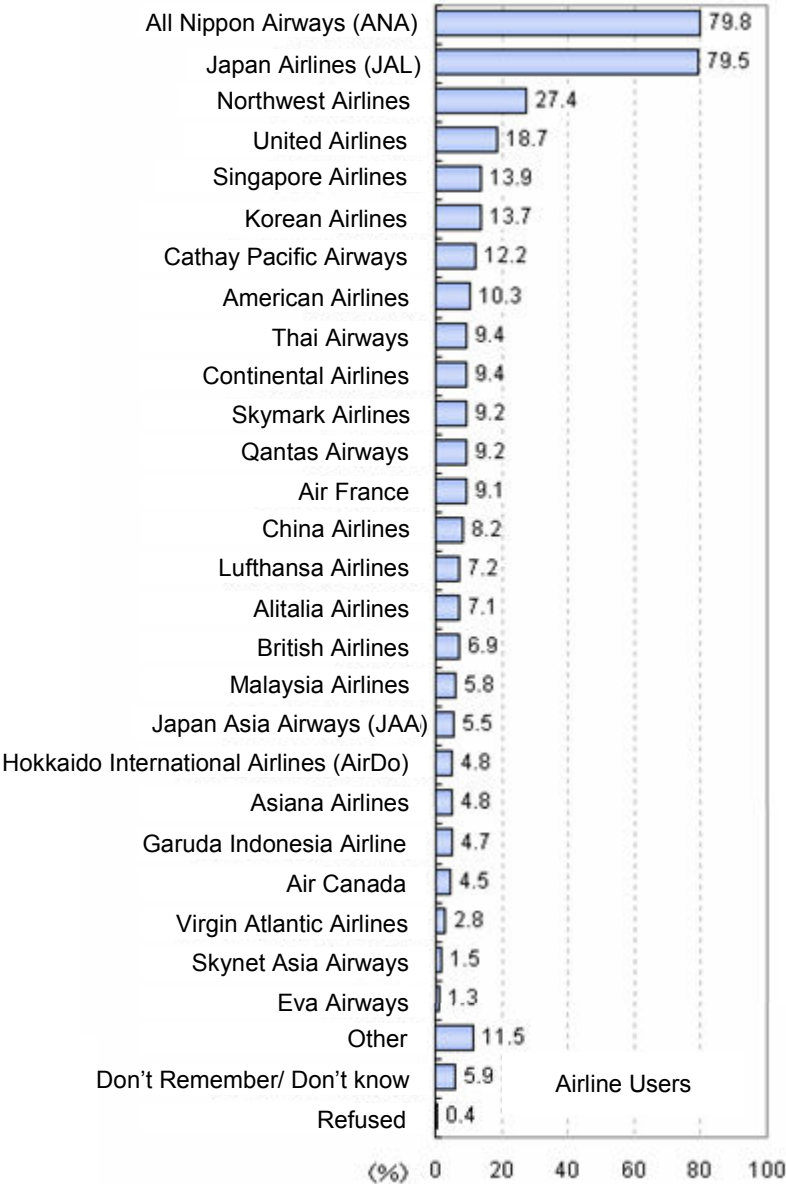
2. **Airline usage purposes** (Past airline users)
 “For what purposes have you flown?” (MA)



- “Domestic vacation” (#1), “Overseas vacation” (#2) and “Business (domestic)” (#3) are the main reasons respondents use airlines.

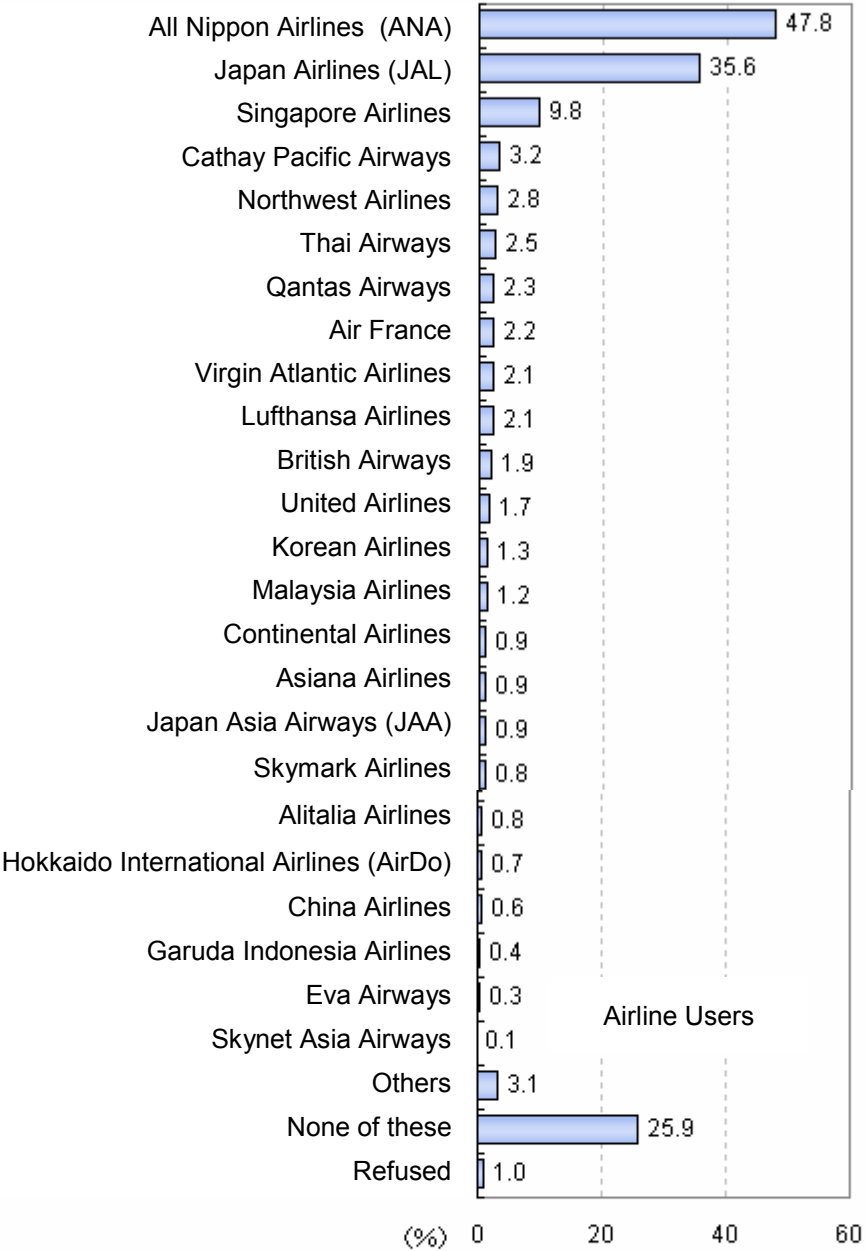
3. Past airlines used (Past airline users)

“Please select all airlines you have used in the past?” (MA)



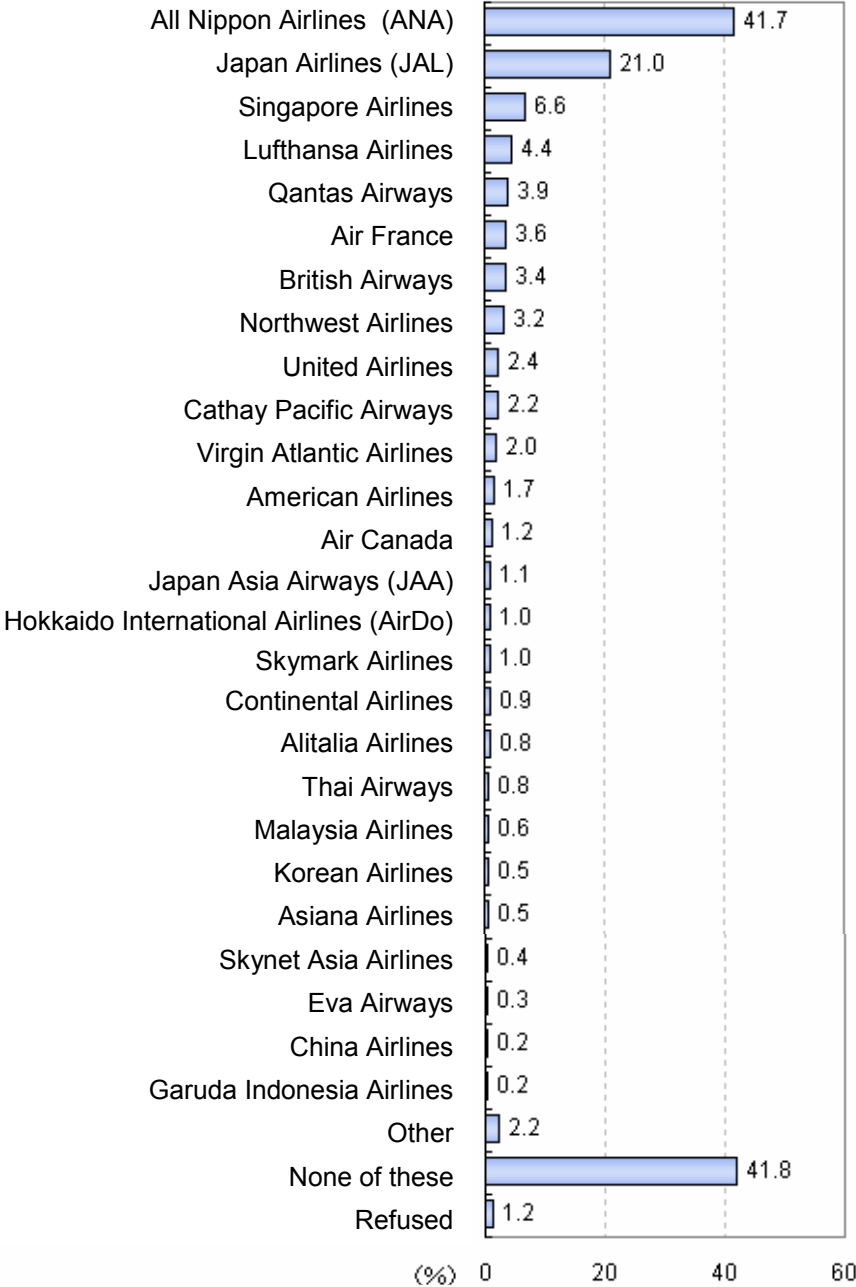
- All Nippon Airlines and Japan Airlines are the most commonly used airlines, with approximately 80% of respondents reporting having used each in the past.

4. High Quality Service (Past airline users)
 “Which of the following airlines do feel offer high quality service?” (MA)



- For “High Quality Service” All Nippon Airlines (ANA) ranked first at 47.8% while Japan Airlines (JAL) ranked second at 35.6%. Amongst foreign carriers, Singapore Airlines scored highest at 9.8%, with all other carriers far behind.

5. Safe Airline (All respondents)
“Which of following do you feel has an image for safety?” (MA)



- “All Nippon Airlines (ANA) ranked first with 41.7% of respondents associating it with a “safe image.” Japan Airlines (JAL) followed in second place with 21.0% of respondents regarding it to have a safe image. Singapore Airlines placed highest amongst foreign carriers.

6. Airline Selection Criteria (Past airline users)

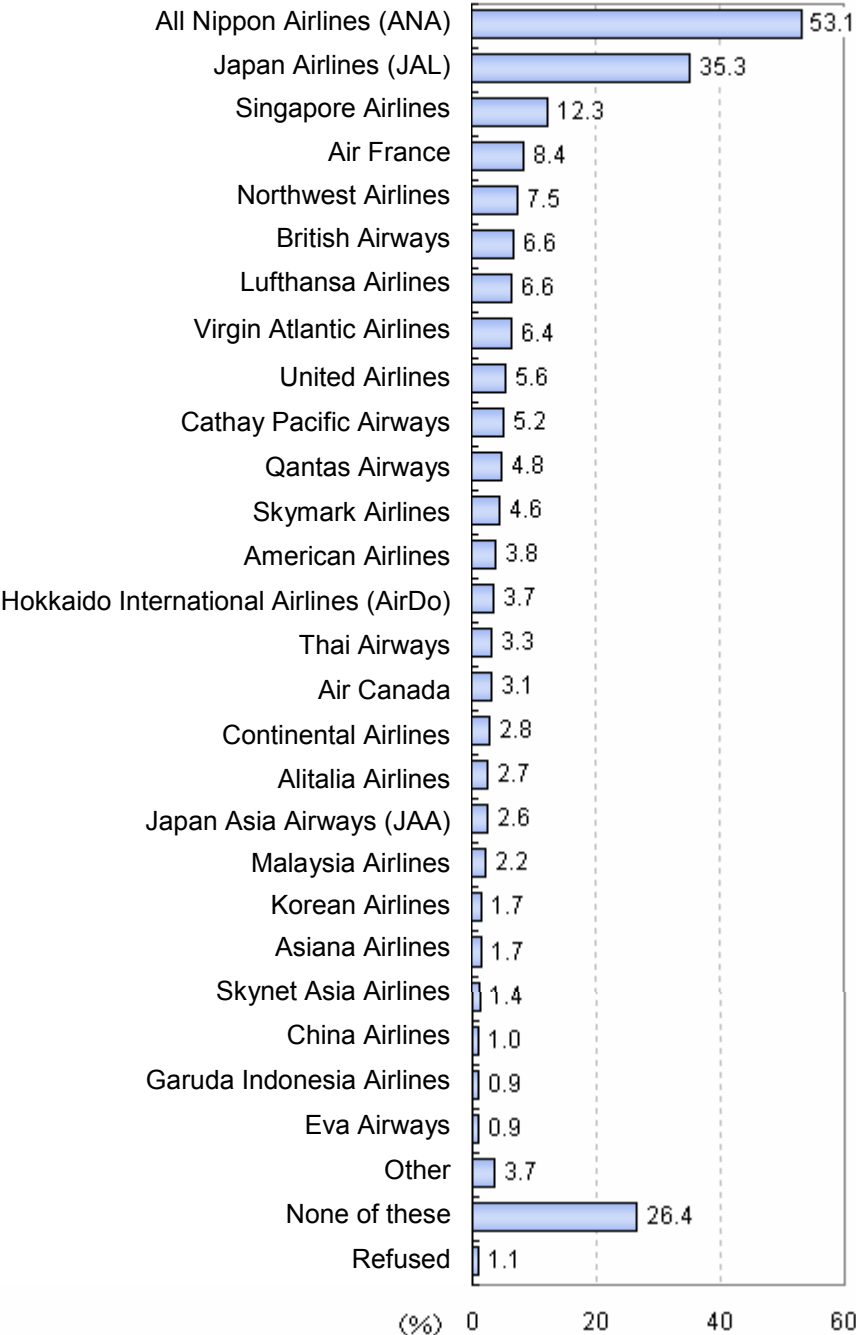
“Which of the following criteria do you consider important when selecting an airline?” (MA)



- “Affordable/ Reasonable price” was the most popular airline selection criteria (43%) followed by “Safe/ Reliable (37.9%)”. “Departure schedule” and “Direct flight to destination” were also popular selection criteria with approximately 30% of respondents selecting each.

7. Preferred Airlines (All respondents)

“Which of the following airlines would you like to use?” (MA)



- All Nippon Airlines (ANA) is the airline respondents would like to use the most, with over 50% selecting it.