

GLOBAL AVIATION TRENDS

2018





GLOBAL COMPARISON

Passengers from the ten surveyed countries have different opinions.

BEFORE THE FLIGHT



Safety Record

Good safety record is still the most important attribute when booking a mid or long haul flight and gained importance in USA, Germany and Japan compared to previous period.

Who to Trust in Recommendations: Own experience is the key!



Own experience is the most reliable source when it comes to airline preference and it became more prominent.

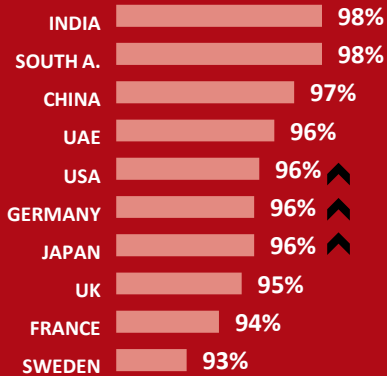
Travel comparison portals are also more important compared to previous period.

All-inclusive prices

Most of air passengers (69%) prefer all – inclusive prices especially in South Africa, Sweden, and India and increased in Japan and USA. Convenience is the main reason (72%) for preferring all-inclusive price option especially in India (91%), China (78%), and South Africa (78%).

GLOBAL AVERAGE

96%



70% Own Experience



57% Friends & Acquaintances



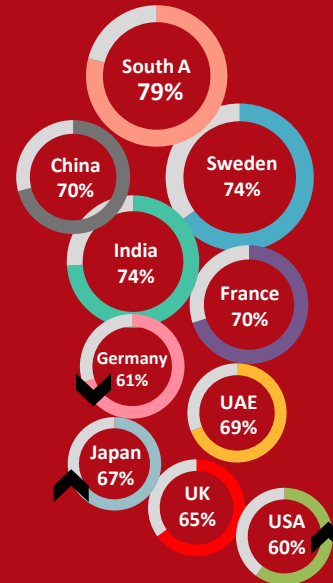
40% Comparison Portals



34% Airline's Website



30% Travel Agency



Participation in Frequent Flyer Programmes



The most expected benefit is still reduced price tickets or free tickets especially in South Africa (71%), France (70%), and USA (66%). While 'Reduced price ticket/free tickets' decreased compared to previous period expectations of 'access to airport lounges' and 'increased baggage allowance' increased considerably.

GLOBAL AVERAGE

52%



61% Reduced price tickets or free tickets



48% Option of an upgrade



42% Access to airport lounges



41% A free flight to a destination which I travel the most



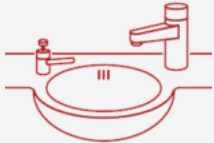
41% Increased baggage allowance



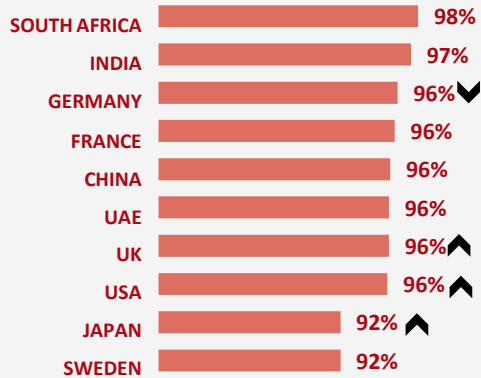
41% Special prices for frequently locations that I travel frequently

GLOBAL COMPARISON

Cleanliness of cabin and lavatory is the top expectation during the flight in all countries.



96%



Friendly, attentive and accessible staff came after cleanliness (94%)

South Africa 98%
India 96%
UAE 96%



Quality of food and beverage (94%)

South Africa 97%
India 96%



Catering on Board



90% Opportunity to drink water at any time

UAE 96%,
China 94%, India 94%



83% Presence of healthy food

India 97%, China 94%, France 93%, UAE 91%, South Africa 90%



80% Choice of several menu options

India 92%, China 91%, UAE 90%, South Africa 88%



75% Attractive selection of soft drinks and juices relating to the destination

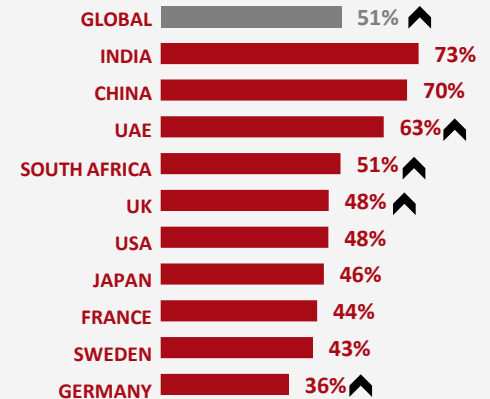
India 91%, China 87%, UAE 86%

Passengers from **UAE, India and China** have **higher scores** compared to other countries **on these 4 expectations.**

DURING THE FLIGHT

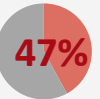
Mobile Phone Usage on Board

Half of the passengers are in favor of mobile phone usage during flight. This rate is significantly higher in **India, China, and UAE.**

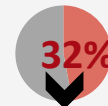


Willingness to pay higher fees for mobile phone usage on board:

Yes, but only if the charges are slightly higher
China 55%, UAE 51%



No, would not be willing to pay
Germany 48%, France 45%, Japan, South A. & Sweden 41%



Yes, even if the fees are significantly higher
India 41%, China 35%



GLOBAL COMPARISON

FUTURE OF AIR TRAVEL



More comfortable seating and free & fast Internet access are most important expectations in the future of air travel and scores of both increased significantly compared to previous period.

Expectations in Germany, UK, and USA increased regarding future of air travel compared to previous period.

	More comfortable seating	Free and fast internet access	Sleeping compartments	Massage seats
GLOBAL	73%	68%	43%	36%
CHINA	66%	74%	38%	47%
UAE	63%	61%	49%	44%
FRANCE	73%	65%	37%	32%
GERMANY	79%	60%	30%	28%
INDIA	70%	71%	63%	42%
JAPAN	72%	65%	30%	42%
SOUTH A.	73%	74%	58%	39%
SWEDEN	75%	55%	36%	26%
UK	71%	65%	47%	29%
USA	79%	74%	49%	33%

AFTER LANDING: IMPORTANCE OF SERVICES ON THE GROUND



92% Uncomplicated delivery service for lost luggage (South A. 96%, China 95%, UAE 94%)



90% Information desk in the baggage reclaim hall in case of lost luggage (India 96%, China, 95%, UAE 95%, South Africa 95%)



75% Collection by pre-booked taxi or transport services directly in the arrival hall (India 91%, China 89%, UAE 85%, South Africa 84%)



74% Access to an arrival lounge where it is possible to refresh (India 96%, China 92%, UAE 88%, South Africa 86%)



70% Accompanied by employees of rental car companies from the arrival hall, provided a rental car is booked (India 90%, China 86%, UAE 79%)



68% On request: free help with luggage pickup from the baggage carousel and the further transport (India 92%, China 91%, UAE 88%)

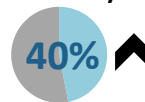
SENSE OF SECURITY

GLOBAL AVERAGE

Sense of security is higher than 2015 global average especially sourcing from Germany, Japan, South Africa, and UK.

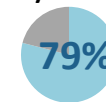


Higher sense of security



India: 74%
China: 69%
South A.: 53%
UAE: 51%

Indication: higher safety standards



India: 91%
France: 87%
Germany: 87%
China: 85%
USA: 85%