



What Asia Wants: Exploring Thailand and Indonesia

From food and beverage offerings to passenger comfort and sustainability

World Travel Catering
& Onboard Services

EXPO





About the author

Jeremy Clark trained in traditional Culinary Arts in London and apprenticed in Switzerland. After time as a chef in London and Switzerland's top hotels, he joined SAS Service Partners at LHR in 1979 and then Swissair in ZRH beginning a career in airline food and service development.

He was responsible for PanAm production and development at LHR before joining Royal Brunei and has since gone on to work with other airlines. As CEO of JC Consulting, he co-developed business systems for the industry and has consulted to operations across the globe and has visited over 250 airline catering operations.

Jeremy is also CEO of APOT, Asia Pacific Onboard Travel Association, Resident Judge and Host for the prestigious Mercury Awards from 2015 onwards and Honorary Judge at SIAL with the Emirates Culinary Guild and WorldChefs. He is a member of the Institute for Learning in London and the Malaysian F&B Executives Association. He has written hundreds of articles for both Onboard Hospitality and PAX International as well as other journals, and has hosted and appeared on panels at various conferences including Taste of Travel at WTCE, Future Travel and Aviation Festival Asia in Singapore. Jeremy has also appeared as an expert commentator on BBC World and BBC News Asia as well as regional TV in Asia, Middle East and Europe. He currently resides in Penang, Malaysia.



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South East Asia

What's on your mind?



Well, here we are again! As 2024 morphs into 2025, we find ourselves preparing for the World Travel Catering & Onboard Services Expo in April. And I'm delighted to have been offered the opportunity to report for Asia, its airlines and suppliers for whom I believe this is an event not to be missed.

Together with WTCE, we've conducted a survey across two of SE Asia's largest and most dynamic markets—Thailand and Indonesia—with some key questions related to onboard services. The aim is to have some visibility into passenger expectations in this post-Covid era.

Across the globe, airlines are still in the process of reassessing their routes, markets and profiles. The big challenges relating to service and hospitality are now further nuanced by exponential growth, regional and international competition, issues around sustainability, and of course, value for money.

With this in mind, we crafted a series of questions aimed

at all age groups and passenger types from frequent business travellers to intermittent leisure passengers. The results were, from our perspective as purveyors and supporters of hospitality, quite encouraging.

So, let's take a closer look at what we discovered. The first thing to state is the two participating countries were Thailand and Indonesia. The reasons for this are that Thailand is the most popular both regionally and internationally so there is massive volume. Meanwhile, Indonesia represents the largest population, a massive domestic market and the highest number of flights and airports.

62%

of all respondents felt that Asia's airlines are better than others from outside the region

It will come as no major surprise that on the question comparing Asian carriers to other regional carriers, Thailand fares slightly better than Indonesia, but not by much. The important take-away is that 62% of all respondents felt that Asia's airlines are either "a lot" or "a little" better than others from outside the region. A further 31% think they are "about the same" which means virtually no-one places airlines from outside the region as better.

Please sir, can I have some more?

This is WTCE, so let's talk about the food. And this survey threw up some very revealing results—so airline executives, please pay attention. This is what your paying customers want....

We asked, "At the point of booking, how important were various aspects of the product to the passenger?" Passengers were asked to rank specific elements and right at the top with a whopping 96.5%, "Customer Service" crosses the line. This was followed in a close second place by "Food & Beverage Quality" at 93.4%.

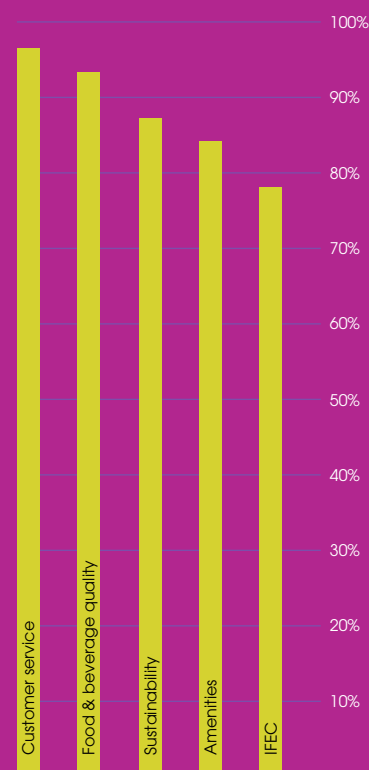
But what does this tell us? Well, both countries seem to rate food quality and service equally, and it shows that, despite the fact that Asian Airlines are already good by both local and international standards, the expectations are higher than airlines currently deliver on. The survey does not differentiate between those who flew mostly on low-cost carriers (LCCs) or on legacy carriers, but we can assume from the age demographics and the regional aspect of the survey—particularly in Indonesia—that the percentage of respondents who fly LCCs is higher. It's worth noting that Thailand rates the cost of add-ons negatively with more than 70% unhappy about them, whilst in Indonesia only 40% are worried about this.

It could be that the dominance of LCCs in and around Indonesia has numbed the senses and they're used to these extra costs whilst Thailand, a more mature market, feels the difference between the legacy all-inclusive products and the LCC charge-them-for-everything policies.

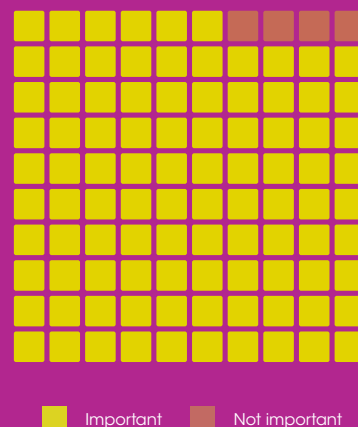
Inflight entertainment trails in last behind amenities and sustainability. This suggests many people bring their own entertainment and toiletries for inflight use, and value a decent meal and great service above all other considerations.

This importance of a good catering service is further reinforced by another question - "How Important is an airline's F&B service to you when selecting your airline", with 96% of respondents reporting it was either "very" or "quite important". Conversely, a mere 4% were not bothered.

When booking flights, how important are the following?



Is an airline's food and beverage service important to you when selecting the airline?



In it for the long haul

So, what about the big money flights, meaning the long-haul flights which are dominated by the legacy operators? On such journeys, the F&B experience ranks as the most important factor together with general customer service.

Here in Asia, we love our food. It is the number one talking topic in casual conversation compared to Britain where they seem obsessed by the weather or Italy where it's fast cars. So, we leave F&B quality aside for a second and look at the expectations of other service offerings on long haul flights.

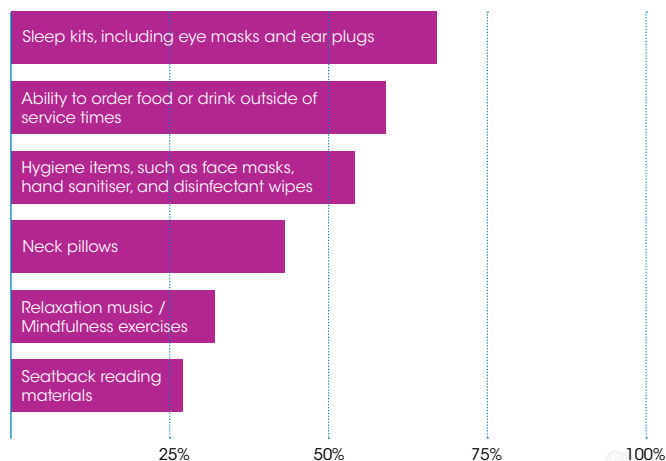
When asked what type of amenities and services people value other than food quality, top of the list was the "Sleep Kit", with 66.5% of passengers valuing this product. Good news for Kaelis, Formia and the rest of the quality kit suppliers.

Amenities is always a difficult one. Most people have their favourite brands of creams and perfumes, so to second-guess it by offering free samples could be more miss than hit. However, the real quality airlines opt for quality samples, so passengers enjoy the opportunity to try something new. Aside from the marketing opportunity for the suppliers.

However, guess what comes in right behind? More food! Almost 60% of passengers want the "ability to order F&B outside of service times" ahead of all other long-haul services.

"Seatback reading" is right down at under 30% together with "Mindfulness exercises" videos or music, which, let's face it, unless you're in a sun-lit grass meadow with some Tibetan bells in the distance, isn't a viable option in a packed aeroplane.

On a long-haul flight, what types of amenities or services, if any, do people find most valuable



Almost 60% of passengers want the "ability to order F&B outside of service times"



Asia is a continent of tough customers with high expectations



To round this section off, and airline executives if you're still with me, here is your take-away: When asked if Asian customers from the two biggest markets would avoid a carrier based on previous bad inflight service, 7 out of 10 said they would, with another 15% only choosing a bad service airline if no other option were available. This means that 85% of your paying customers will rate you and reselect you on the basis of the service you offer rather than price or route.

Interestingly, there is still 6% out there who either can't afford it or, more likely, simply don't care and are happy to repeat the misery. I rather think it's more the latter.

It's worth noting also that almost 74% of Indonesians would stand firm by avoiding a bad option, while only

60% of Thais would. Either way, Asia is a continent of tough customers with high expectations.

It's fascinating to observe how, over the past 30–40 years, the tables have turned 180°. In the '70s and '80s, the big US Super Airlines like TWA, PanAm and Northwest Orient dominated with service and quality. I think that were a similar question asked today—"Would you still fly on an airline despite bad service" in the US market, the answer would be a depressing "What choice is there?".



Sustainability was the third most important consideration when booking a flight. So consumers care, but only up to a point.

Captain planet



Let's now deal with a more contentious subject, the "sustainability" issue. This word, together with "climate change" has been hi-jacked, adopted, misinterpreted, misused and bandied about with little caution to the facts by pretty much every company or organisation with an angle to take on it.

The fact is that most people have no real understanding of what 'sustainability' actually means. It's used, particularly in Europe, as a lever to either elicit a sense of alleged environmental awareness by a company, or as a subtle way to shove an extra fee onto a fare.

In the world of provisioning, there's much that can be done. In fact, we have been doing a lot of it for years, but no-one noticed. The ability to recycle is the number one priority and the recent rush to get rid of single-use plastic is a great move. However, there is a realisation that disposable cardboard (plastic lined), paper straws (chemically lined), bamboo cutlery (with problematic additives) and most alternative disposables are as bad, if not worse.

So, we're slowly returning to re-usable rather than recyclable. It's much better for the planet to re-use metal cutlery and chinaware or melamine crockery than to

chuck single-use disposable stuff into incinerators or landfill.

Recycling unused food is a bigger problem and, in both cases, the biggest culprit isn't the airline or the passenger, it's government regulations that place so many demands making effective recycling almost impossible. So, when an airline declares it is "sustainable", look carefully at what they actually mean. Generally, it means offering less and charging more and making you feel good about it.

On the simple question of whether Asian customers would be willing to pay more for an airline that "prioritised sustainability" almost 46% said they would "consider" it and 47% said they definitely would. That breaks down by age groups, the older place less importance than the younger. This could be because older folks figure they have less time to care, or they are older, therefore wiser and smarter. Who knows.

Returning to the 93% who placed F&B quality as the most important consideration when booking a flight, sustainability came third out of five. So, they care... but only up to a point. The issue is that until sustainability is quantified properly, this issue remains vague at the very least.



Where do we go from here?

Having clearly established that, aside from arriving on time, not losing the bags, and not crashing, service and food are the most valuable considerations for Asian passengers and their travel choices. But what needs improving?

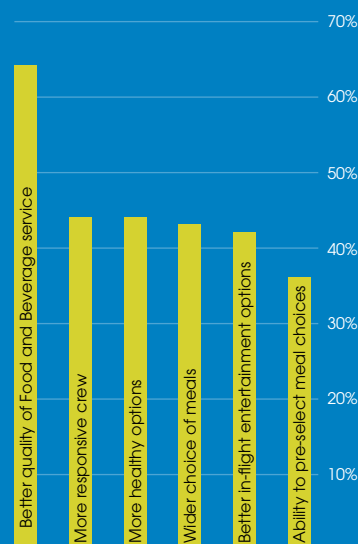
Bear in mind that, of all the world's travel regions, we are fortunate that Asia and the Middle East boast some of the best airline products. The top 10 of almost every world-wide survey is dominated by airlines from this region, so asking for improvements where the bar is already set so high, is quite a demand.

We asked a multi-choice question of the markets "What, if anything, would you most like to see airlines improve on?" Can you believe it—"Better quality of F&B service" hauled in 64% suggesting that almost two thirds of people think that "great" could be better.

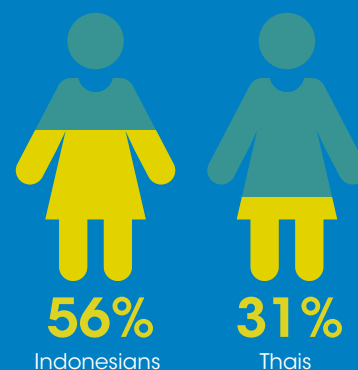
Fascinatingly, the highest demand for both better quality and healthier options was in the 55+ age group. If you think about it, that isn't surprising—we have less time left, so let's keep healthy and eat the best quality! Also, women are more demanding of quality and healthier options than men.


Another choice in the category of what can be improved was "More responsive crew" and here the stark difference between Thailand and Indonesia leaps from the page with more than 56% of Indonesians demanding better crew, whilst only 31% of Thais feel there needs to be an improvement.

What would passengers most like to see airlines improve on?



How many passengers would like to see a more responsive crew?





The results also found that 36% of Asian passengers like the idea of pre-selecting meal choices. This isn't easy to analyse because if you're flying super LCC, you make a meal choice at booking. That choosing policy is missing from all other levels of service until you reach the premium cabin on legacy carriers with 'Book The Cook' type services. But either way, the ability to make a choice is a selling point.

36%

of Asian customers like
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So, to summarise... We are spoilt here in Asia. We have the best airlines and they serve the best food from the best crew—but still, there is room for improvement. Thanks to the team at WTCE, we have some valuable insights to share. WTCE lays out all the choices and offerings for the airlines to cherry-pick a service that meets the demands of their markets. And the markets here are saying loud and clear "Please sir, can we have some more".



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WTCE is known as the place where ideas, products and solutions tantalise the senses to create an onboard experience that dazzles the passenger.

If you are in the airline, cruise or rail service industry, you know that passengers make choices based on quality service and exceptional all around experiences. First-hand knowledge of what is happening in the industry cannot be beaten, and our event allows you to create better experiences by discovering the products for yourself.

Discover the latest trends; Passenger experience professionals from across the globe attend WTCE to keep up-to-date with what's new in the onboard industry, passenger tastes and product innovations through a range of event features.

An experiential marketplace; International airline, rail and travel catering buyers can experience 1,000's of onboard catering and passenger comfort products on the exhibition floor over the three days.

A place for collaboration; Each year 5,000 attendees from companies including onboard suppliers, airlines and caterers, attend WTCE to collaborate on what's next for the onboard services industry.



300+
Onboard Suppliers



900+ Airline, Rail
and Cruise Buyers



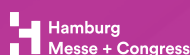
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