Air Travelers in America

Findings of a Survey Conducted by Ipsos

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Ipsos Research Approach and Poll Accuracy

- A4A selected Ipsos Public Affairs ("Ipsos"), one of the top polling firms[1] in the country, to conduct a poll[2] January 8-17, 2018, on behalf of Airlines for America (A4A). For the survey, a sample of 5,046 adults age 18+ from the continental U.S., Alaska and Hawaii was interviewed online in English. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval[3] of ±1.6 percentage points for all respondents and ±2.3 percentage points for those who flew on an airline in 2017.

- The sample for this study was randomly drawn from Ipsos's online panel,[3] partner online panel sources, and "river" sampling[3] and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2016 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Post-hoc weights were made to the population characteristics on gender, age, region, race/ethnicity and income.

- Statistical margins of error are not applicable to online polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=5,046, DEFF=1.5, adjusted Confidence Interval=3.1).

1. https://projects.fivethirtyeight.com/pollster-ratings/
2. https://www.ipsos.com/en-us/news-polls/airlines-america-air-travelers-america-2017
3. https://www.ipsos.com/en-us/public-opinion-polling-and-communication-research

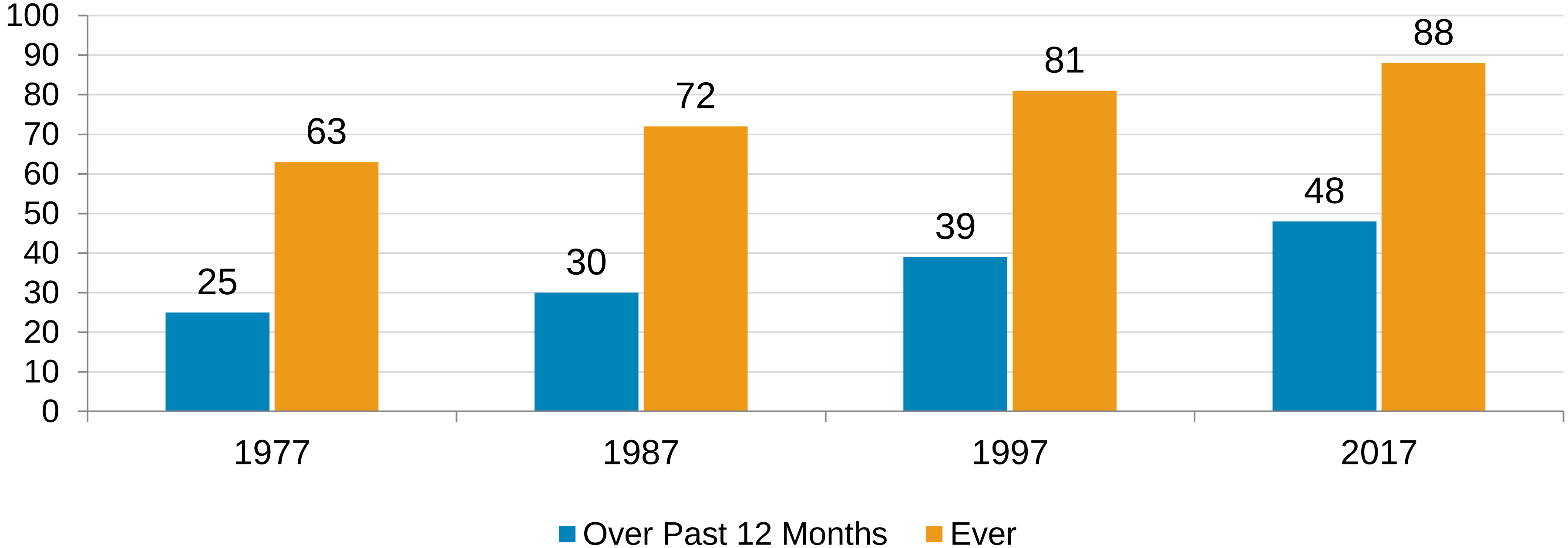
Source: Ipsos survey of American adults (January 2018)

As Commercial Air Travel Has Become Safer and More Accessible, More Americans Are Taking to the Skies: Almost 90% in Their Lifetimes, Almost 50% in Past Year

"The hub-and-spoke network has really been a wonderful thing for mobility of Americans."

Rick Geddes, Director of the Cornell Program in Infrastructure Policy (Dec. 20, 2017)

% of U.S. Adult Population That Flew on an Airline



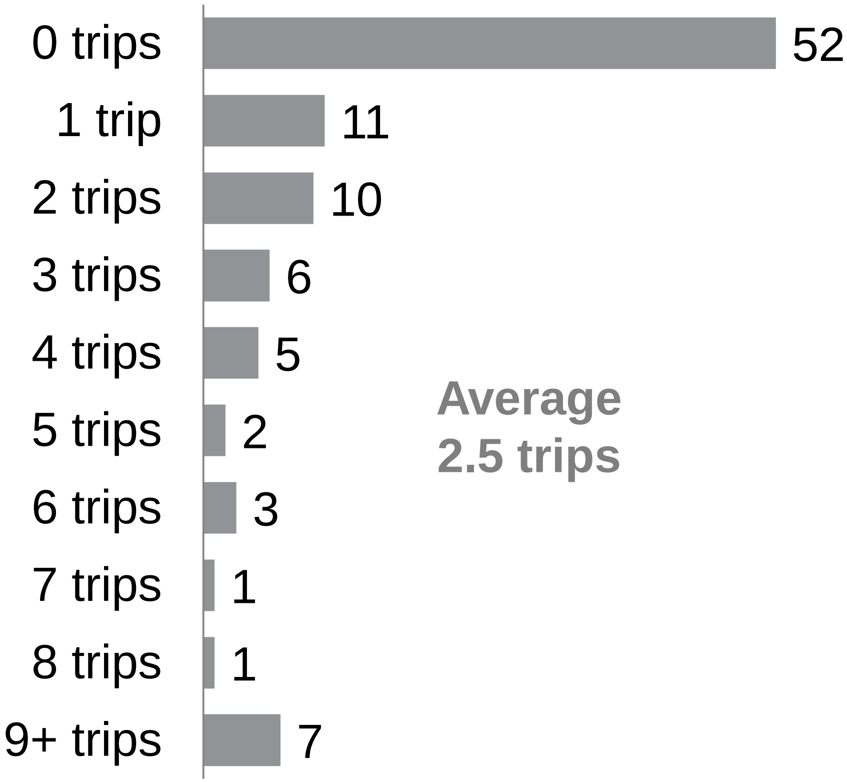
Sources: Gallup and Ipsos Public Affairs; NBC News (Dec. 20, 2017)

On Average, American Adults Took 2.5 Airline Trips in 2017; Flyers Took 5.3 Trips

7% of Americans and 15% of Flyers Took 9 or More Trips; 24% of Flyers Took Just 1 Trip

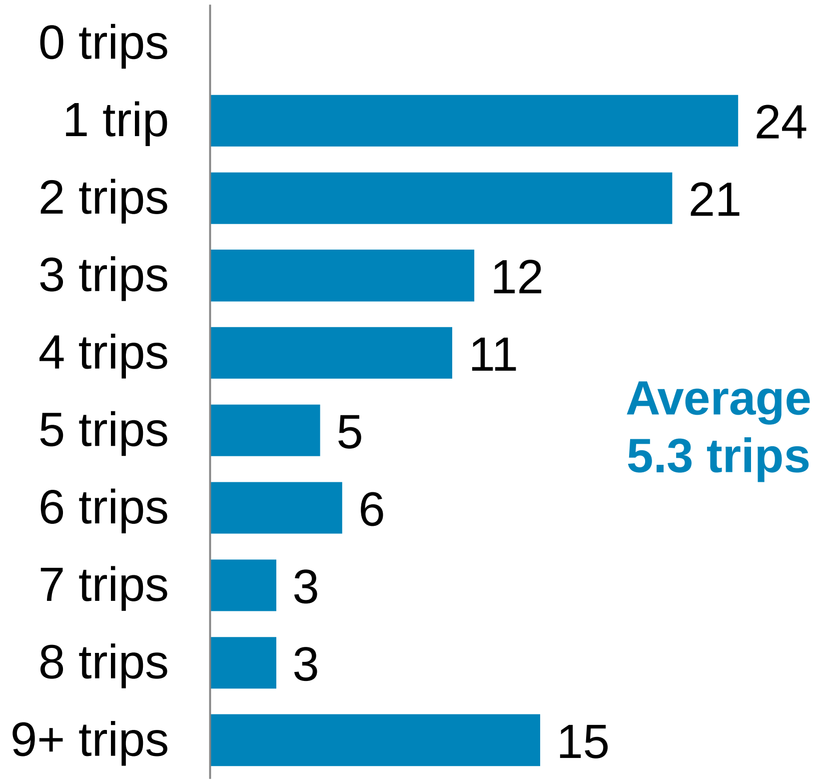
All American Adults

% of all Americans take X trips



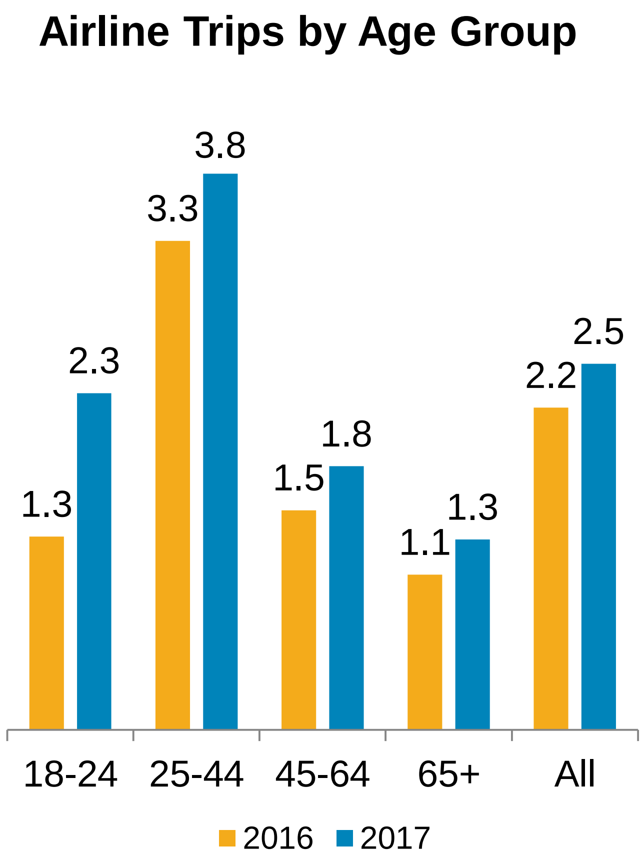
2017 Airline Travelers

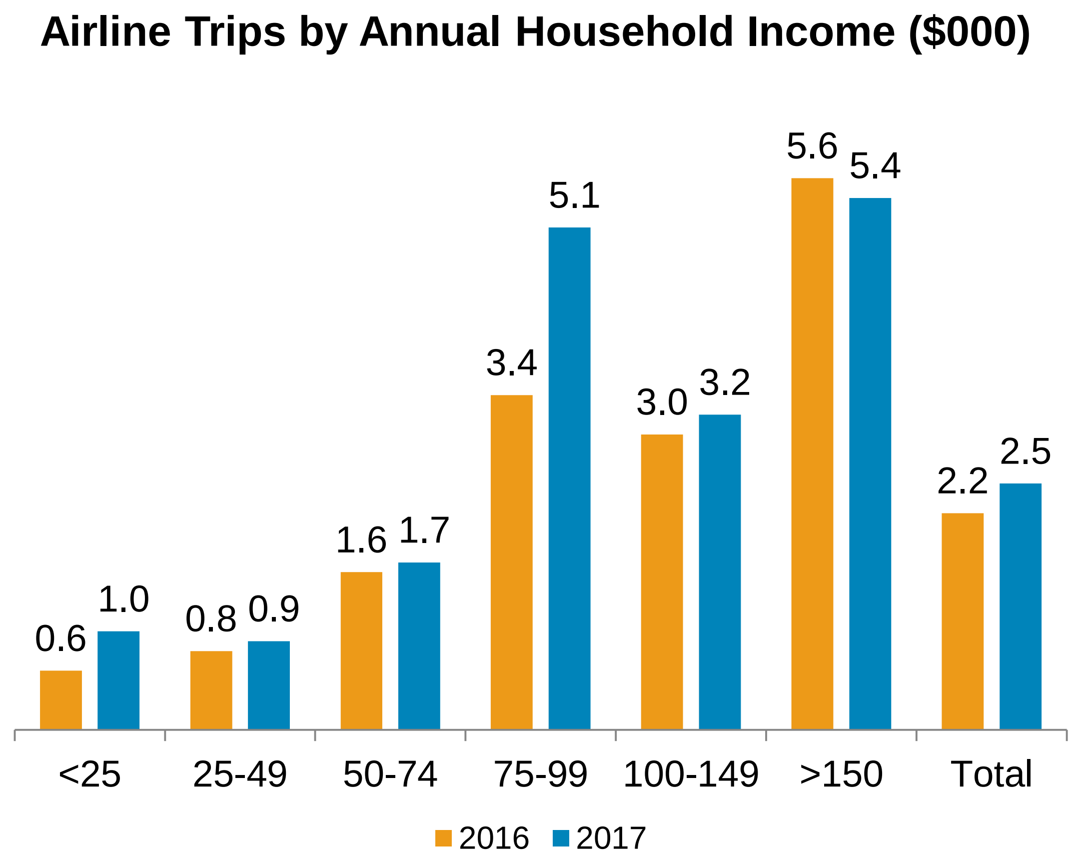
% of 2017 Flyers take X trips



Source: Ipsos Public Affairs

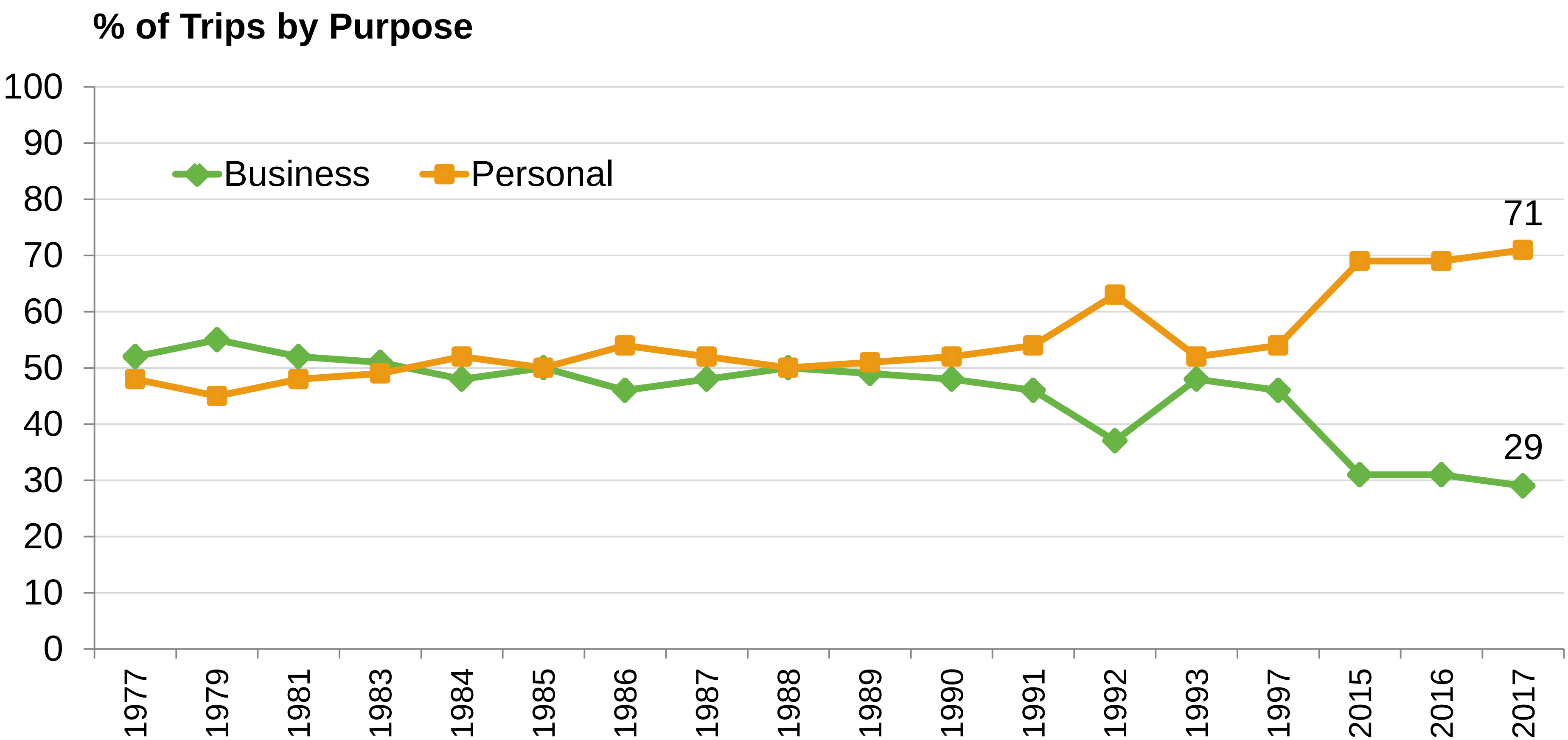
Americans of All Age Groups and All Household Income Levels – Except the Top Earners – Took More Airline Trips in 2017 Than They Did in 2016





Source: Ipsos survey of American adults (January 2018)

More Than Ever Before, Americans Are Traveling by Airline for Personal Reasons



Source: Gallup and Ipsos Public Affairs

Half of 2017 Airline Trips Were Taken Primarily for Leisure – 2.6 per Flyer

Two-Thirds of Trips Were Domestic, Half of Which Were Taken for Leisure Purposes

*In 2017, **how many trips** did you take on airlines for the following purposes? (Please think about domestic and international trips separately, and count each round trip as one trip.)*

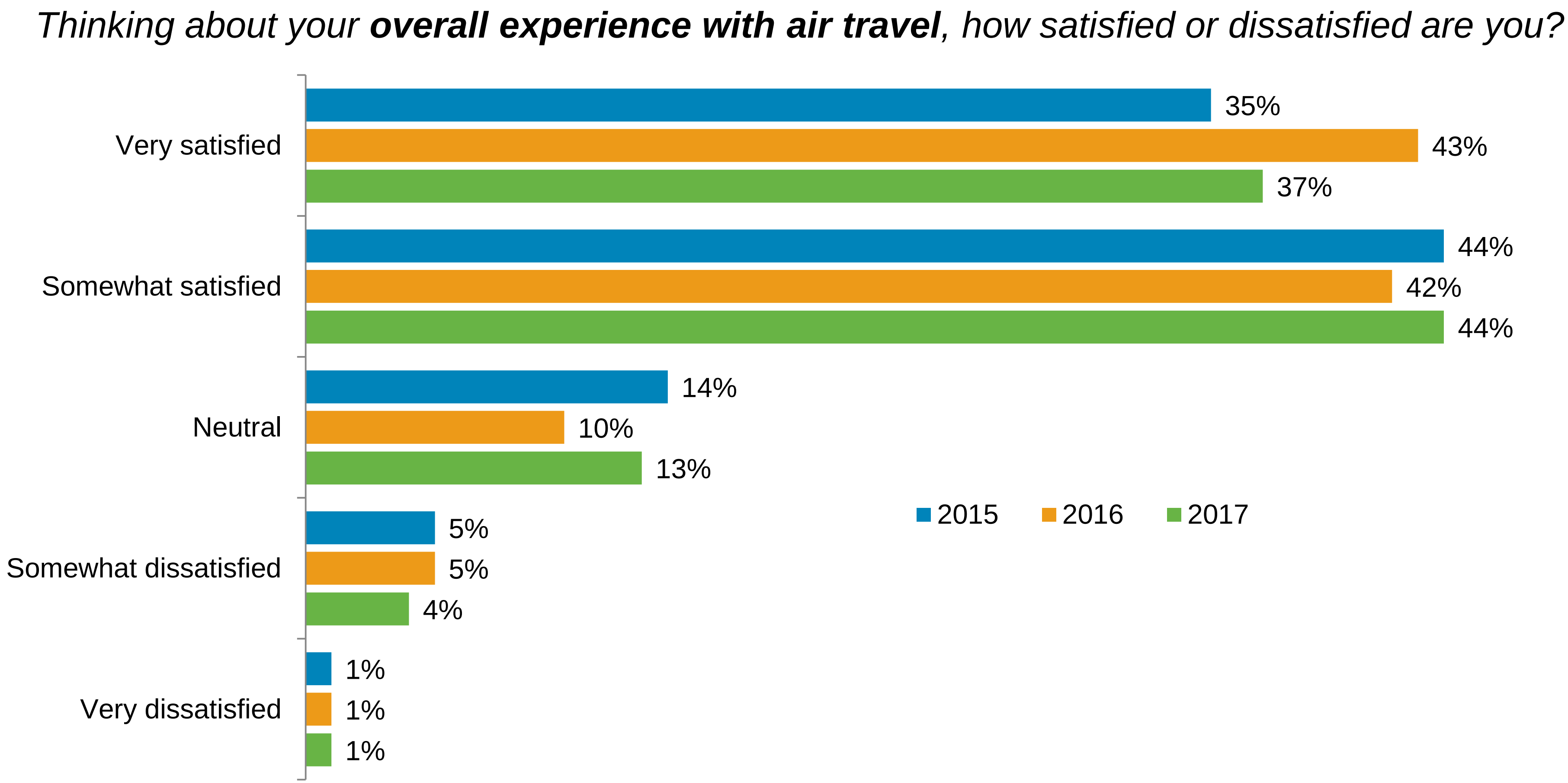
(Average Trips and Share [%] of 2017 Flyers)

Destination/Purpose	Business	Personal Leisure	Personal Non-Leisure*	Total
Domestic	1.1 (20%)	1.8 (34%)	0.7 (13%)	**3.6 (67%)**
International	0.5 (9%)	0.8 (16%)	0.4 (8%)	**1.7 (33%)**
Total	**1.6 (29%)**	**2.6 (50%)**	**1.1 (21%)**	**5.3 (100%)**

* Includes traveling to/from college, family event, job interview, funeral, medical matters

Overall Flyer Satisfaction Fell to 81% in 2017, With More Reporting “Neutral”

For Third Consecutive Year, Only 1% of Flyers Reported Being “Very Dissatisfied”

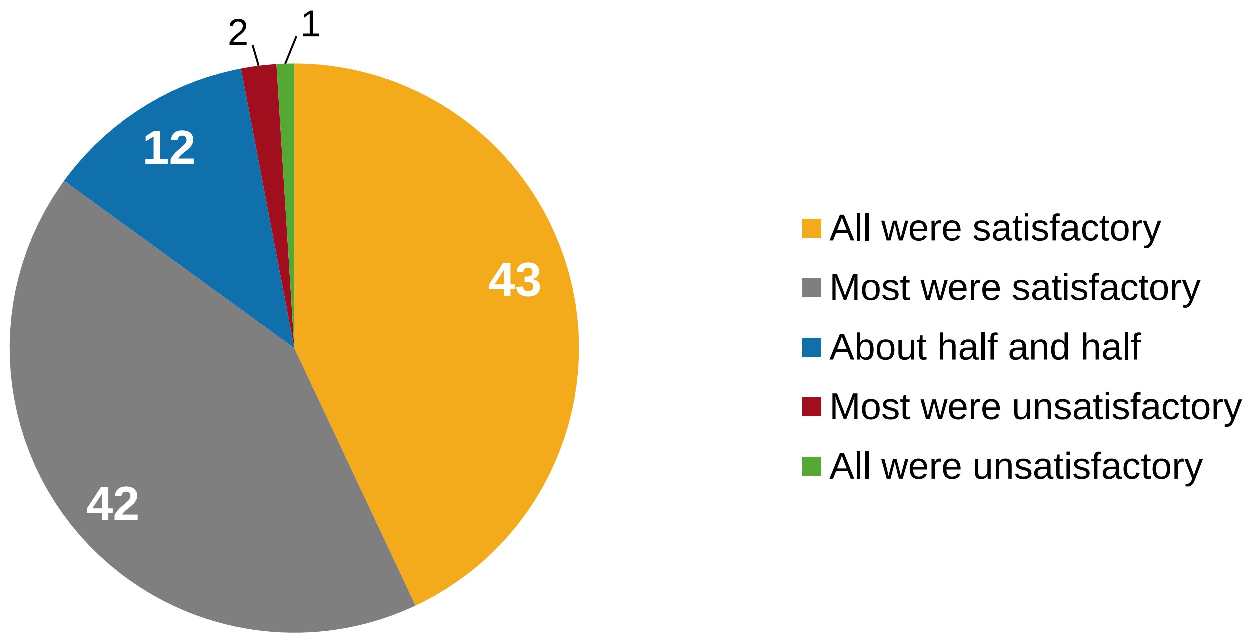


Source: Ipsos surveys of American adults (December 2015, January 2017 and January 2018)

85% of 2017 Flyers Said Most (42%) or All (43%) Flights Were Satisfactory

Only 3% of Flyers Indicated That Most or All Flights Were Unsatisfactory

*Of all the flights you took in 2017, **what amount were satisfactory** to you?*

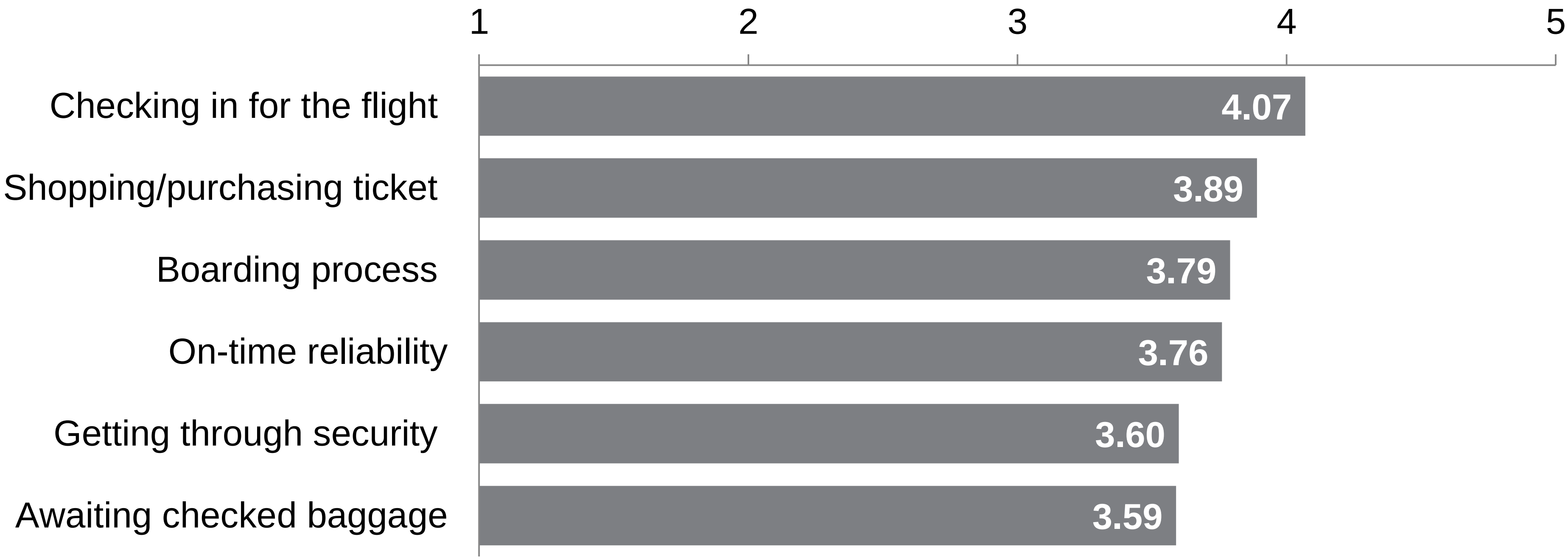


Source: Ipsos survey of American adults (January 2018)

2017 Flyers Gave Highest Marks to Check-In and Shopping/Purchasing Experience

Getting Through Security and Awaiting Checked Bags Trail the Pack

*In 2017, on a scale of 1 (very dissatisfied) to 5 (very satisfied), how would you **rate your overall satisfaction** with each of the following?*

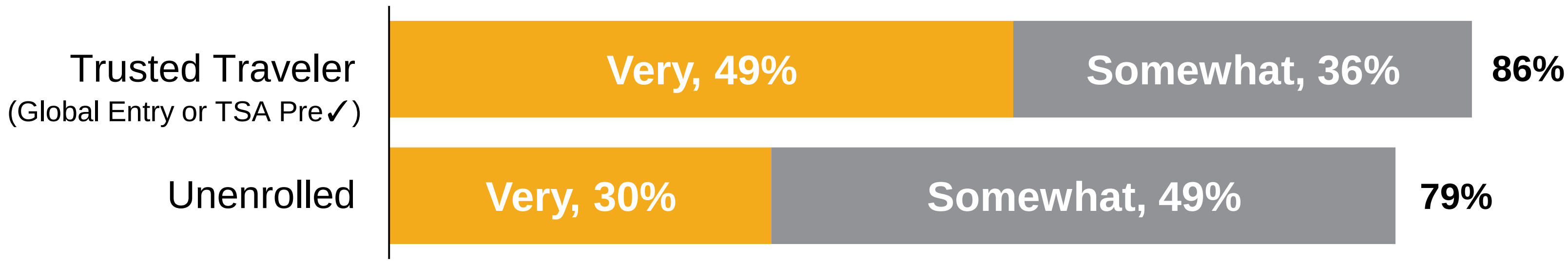


Source: Ipsos survey of American adults (January 2018)

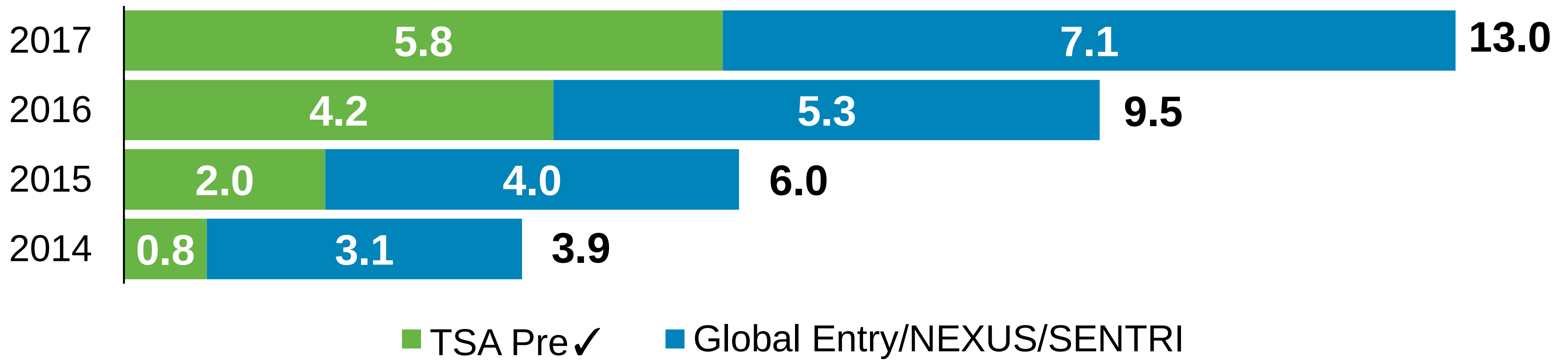
Flyer Satisfaction Rises Markedly With Enrollment in “Trusted Traveler” Programs

Airline/Government Collaboration Boosting Enrollment in Global Entry and TSA Pre✓

% of 2017 Flyers “Somewhat Satisfied” or “Very Satisfied” With Overall Air Travel Experience



Millions of Persons Enrolled in DHS Trusted Traveler Programs (Dec. 31)



Sources: Ipsos survey of American adults (January 2018), Transportation Security Administration, Customs and Border Protection

Personal International Flyers Stayed the Most Nights, Domestic Business the Least

45% of PD Flyers Stayed 4-7 Nights; 31% of PI Flyers Stayed 8-30 Nights

*On average, **how many nights** did you stay at your destination when you took the following trips?*

(Share [%] of 2017 Flyers)

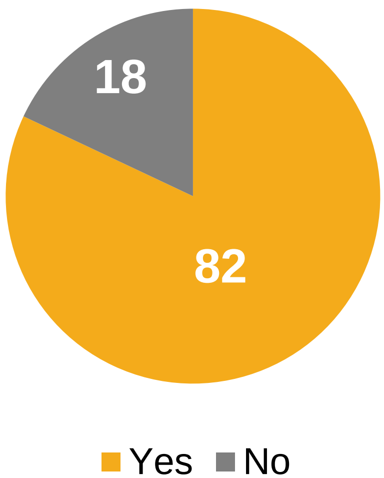
Nights	Personal Domestic	Personal International	Business Domestic	Business International
0-3	41	38	68	57
4-7	45	29	23	29
8-14	11	23	6	9
15-30	3	8	3	3
31+	1	2	1	1
Subtotal ≤ 1 week	**86%**	**67%**	**91%**	**86%**

Source: Ipsos survey of American adults (January 2018)

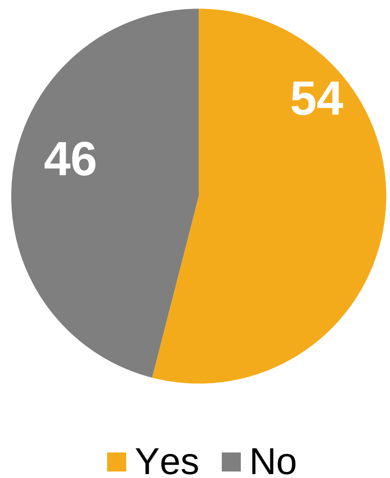
Most Flyers Checked at Least One Bag in 2017, About Half of Whom Paid to Do So

46% of Those Who Paid to Check a Bag Reported Paying at Time of Ticket Purchase

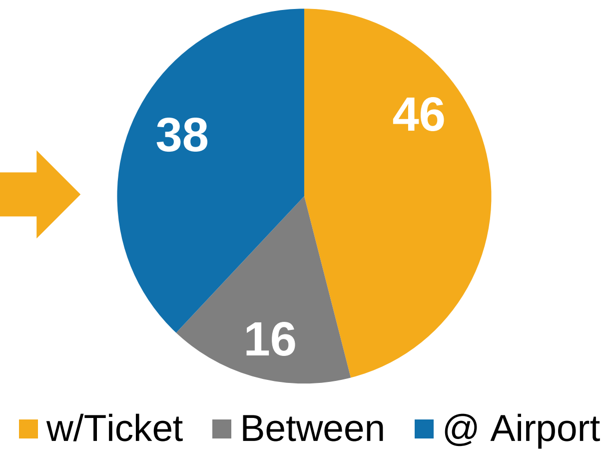
*At any point in 2017, did you **check** a bag?*



*At any point in 2017, did you **pay** to check a bag while taking a **personal** trip?*



***At what point** of your journey do you typically elect to **make payment**?*



Source: Ipsos survey of American adults (January 2018)

Choice of Airline Explained Most Instances of Avoiding Fees for Checked Bags

Frequent Flyer Status and Credit Card Also Helped Travelers Avoid Separate Charges

In 2017, when checking a bag that did NOT require payment, what were the ***reasons*** *that payment was not required? (select all that apply)*

(Share [%] of 2017 Flyers)

Reason Payment Not Required	Percent
Flew an airline that didn't charge separately for bag(s)	46
Credit card entitled me to one or more free checked bags	18
Status with airline (e.g., elite frequent flyer)	18
Ended up checking bag at the gate instead	14
Had a special voucher	5
Member of the military	4
Other	4

Source: Ipsos survey of American adults (January 2018)

41% of 2017 International Business Trips Were Booked in First/Business Class

Nearly Half of International Personal Flyers Book First/Business/Premium Economy

*What **type of ticket** do you (or your company) usually book for these kinds of trips?*

(Share [%] of 2017 Flyers)

Ticket Class	Personal Domestic	Personal International	Business Domestic	Business International
First or Business	13	16	22	41
Premium Economy	18	31	28	37
Standard Economy	70	53	51	22
Subtotal Premium	**31%**	**47%**	**50%**	**78%**

Source: Ipsos survey of American adults (January 2018)

Most International Business Travelers Booked Within One Week of Departure, Whereas Most Personal Travelers Booked More Than Three Weeks in Advance

***How far in advance** of the trip do you usually book travel for these kinds of trips?*

(Share [%] of 2017 Flyers)

Advance Booking	Personal Domestic	Personal International	Business Domestic	Business International
0-3 days	7	10	17	18
4-7 days	14	18	26	36
8-21 days	18	13	29	24
22 days to three months	42	28	25	15
More than three months	19	31	4	5
Subtotal > 3 weeks	**61%**	**59%**	**29%**	**20%**

Source: Ipsos survey of American adults (January 2018)

Two-Thirds of PD Travelers Use Airline Websites to Search for Preferred Flights

Many Business Travelers Continue to Rely on Traditional Agents or Airline Reservationists

*When flying, which resources do you typically use to **identify/search** for the optimal itinerary (e.g., times of day, routing, fare, aircraft type)? (Select all that apply)*

(Share [%] of 2017 Flyers)

Resources Used to Search Flights	Personal Domestic	Personal International	Business Domestic	Business International
Airline Website	68	56	49	47
Online Travel Agency[1]	48	45	37	38
Aggregator/Metasearch Engine[2]	19	21	16	19
Airline Reservation/Ticketing Agent[3]	17	21	23	28
Traditional or Corporate Travel Agency[4]	9	17	17	25
Other	1	3	6	2

[1] Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair, etc.

[2] Google Flights, Hipmunk, Kayak, Momondo, Skyscanner, etc.

[3] Airline reservation agent (either over the phone or in person)

[4] Bricks and mortar travel agency or corporate travel department

Source: Ipsos survey of American adults (January 2018)

Personal Air Travelers Booked Their Flights Predominantly Online

26-27% of Business Flyers Booked Using Traditional Travel or Airline Agents

*What resource do you usually use to **book** travel for these kinds of trips?*

(Share [%] of 2017 Flyers)

Resource Used to Book Flights	Personal Domestic	Personal International	Business Domestic	Business International
Airline Website	56	40	39	34
Online Travel Agency[1]	36	40	29	38
Traditional or Corporate Travel Agency[2]	3	11	16	13
Airline Reservation/Ticketing Agent[3]	4	7	11	13
Other	1	3	6	2
Subtotal Online	**92%**	**80%**	**68%**	**72%**

[1] Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair, etc.

[2] Bricks and mortar travel agency or corporate travel department

[3] Airline reservation agent (either over the phone or in person)

Source: Ipsos survey of American adults (January 2018)

Airline Miles Were Primary Factor in Choice of Payment

Card Rebates and/or Surcharges Were Also Significant Factors for Many 2017 Flyers

***Why** did you choose this **form of payment**? (Select all that apply)*

(Share [%] of 2017 Personal Flyers)

Basis for Selecting Form of Payment	Personal Flyers
Airline miles	35
Rebate by card provider	26
No surcharge on transaction	23
Other airline benefit (e.g., priority boarding, free checked bags)	17
Installment option (e.g., BillMeLater)	10
Other	15

Source: Ipsos survey of American adults (January 2018)

Flyers Checking Bags More Inclined (11-Point Differential) to Check in at Counter

Check-In via Mobile Devices and Airport Kiosks Increased From 2016; PC Dropped

*In 2017, how did you most commonly **check in** for trips?*

(Share [%] of 2017 and 2016 Flyers)

Means of Check-In	*Not* Checking Bag(s) 2017 (2016)	Checking Bag(s) 2017 (2016)
Personal Computer	25 (29)	19 (22)
Mobile Device/App	25 (21)	17 (15)
Airport Kiosk	21 (19)	20 (19)
Airport Ticket Counter	18 (20)	29 (31)
Curbside (at the Airport)	6 (6)	10 (9)
None of the Above	6 (4)	5 (5)

Subtotal PC or Mobile Device	**50% (50%)**	**36% (37%)**

Source: Ipsos survey of American adults (January 2018)

Most Americans Describe the Airline Industry as Competitive or Are Neutral

Only 2-4% Describe the Airline Industry as "Not at All Competitive"

***How competitive** or not is the airline industry to be when it comes to the following?*

(Share [%] of All Americans)

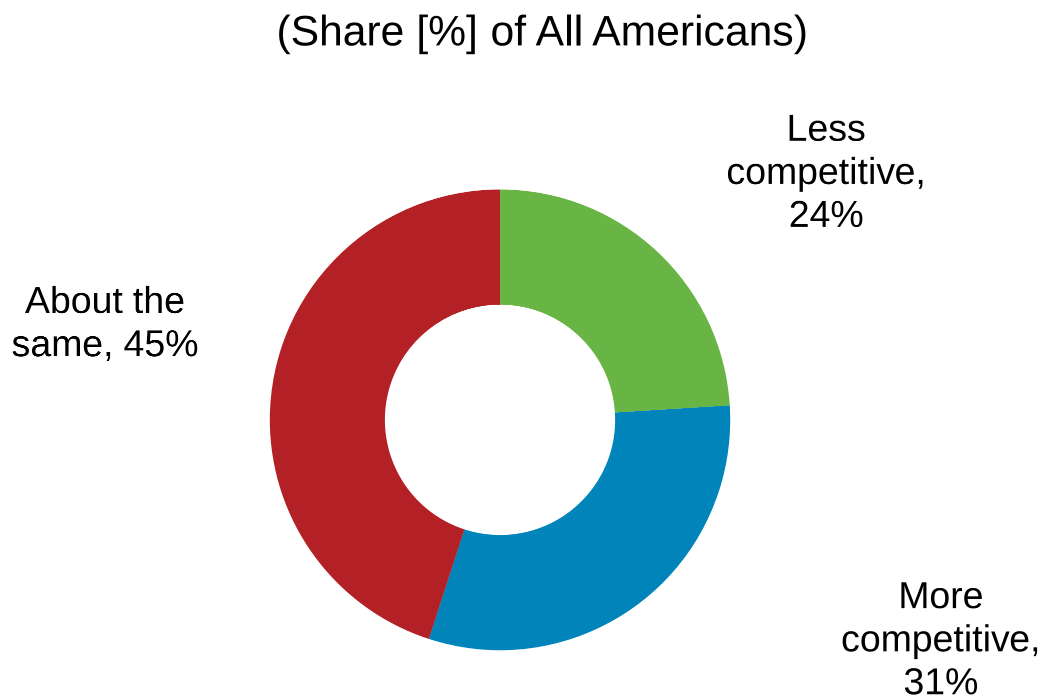
Rating (1 to 5)	Choice of Carriers (e.g. number, type)	Price / Affordability	Flight Times / Routes
5 – Very competitive	18	21	16
4 – Somewhat competitive	42	39	40
3 – Neutral	28	22	31
2 – Not very competitive	9	15	11
1 – Not at all competitive	2	4	3

Mean Rating	**3.6**	**3.6**	**3.6**
Not very/at all competitive	**11%**	**19%**	**13%**

Source: Ipsos survey of American adults (January 2018)

Three-Fourths of Americans Find the Airline Industry to Be as (45%) or More (31%) Competitive Than It Was Five Years Ago

*How has airline industry **competitiveness changed**, if at all, relative to 5 years ago?*



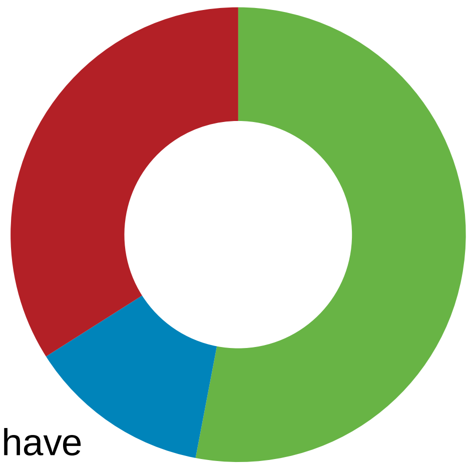
Source: Ipsos survey of American adults (January 2018)

Two-Thirds of 2017 Flyers Belong to at Least One Airline Frequent Flyer Program

Only 13% of Flyers Reported Having Elite Status

*Are you currently enrolled in any frequent flyer program and do you have any **status** giving you extra privileges (like early boarding, lounge access or free checked bags)?*

(Share [%] of 2017 Flyers)

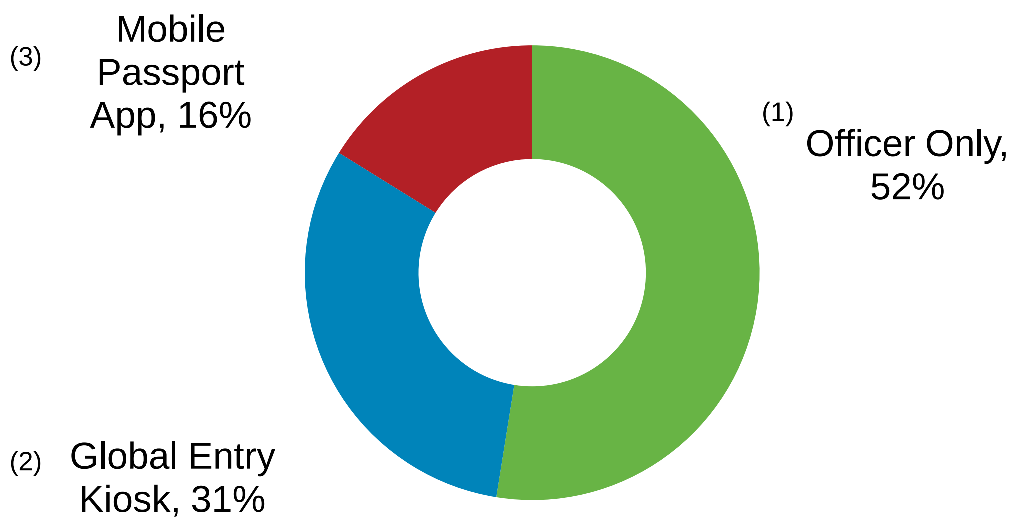


Source: Ipsos survey of American adults (January 2018)

Nearly Half of 2017 International Flyers Utilized Electronic Tools (Kiosks/Apps) to Expedite Clearing of Customs/Immigration Upon Returning to the United States

*In 2017, how did you **typically clear U.S. Customs/Immigration** upon returning to the USA?*

(Share [%] of 2017 International Flyers)



[1] Proceeded directly to the Customs/Immigration officer, without using any digital tools to expedite clearance
[2] Used a Global Entry kiosk before proceeding to the officer – see https://www.cbp.gov/travel/trusted-traveler-programs/global-entry
[3] Used the "Mobile Passport" app before proceeding to the officer – see https://www.cbp.gov/travel/us-citizens/mobile-passport-control

Source: Ipsos survey of American adults (January 2018)

Uber/Lyft Gained 5 Points (vs. 2017) of Market Share re: Getting Flyers to the Airport

Uber and Lyft Now Command More Than Double the Share of Traditional Taxis

*Assuming all options were available, which is your **typical means of getting to the airport**?*

(Share [%] of 2017 and 2016 Flyers)

Means of Airport Access	Business 2017 (2016)	Personal 2017 (2016)
Personal Vehicle	40 (37)	54 (54)
Uber or Lyft	25 (20)	19 (14)
Traditional Taxi	12 (15)	7 (9)
Shared Van/Shuttle	9 (11)	6 (7)
Limousine/Car Service	7 (9)	6 (5)
Public Transit (Bus/Train)	6 (7)	5 (7)
Other	1 (1)	3 (4)

Source: Ipsos survey of American adults (January 2018)

When Choosing an Airline, Business Travelers Value Loyalty Programs and Flight Schedules Most, Closely Followed by Affordability

*When traveling **for business**, how would you rank the following in terms of choosing **which airline to fly**, with 1 being your first priority and 8 being your last priority?*

(Base = 2017 flyers with **at least 6 business trips**)

Criteria	2017 (2016)	Score
Airline frequent flyer program (earn / redeem / upgrade / status)	1 (5)	3.34 (4.55)
Flight schedule (routes, timings)	2 (1)	3.57 (3.22)
Affordability (airfare / ancillaries / taxes)	3 (3)	3.74 (4.23)
Airline seat comfort	4 (4)	4.37 (4.26)
Quality of inflight amenities (food / entertainment / WiFi)	5 (6)	4.67 (4.65)
Reliability of on-time departure and arrival	6 (2)	4.69 (4.22)
Customer service (reservation/gate agents, flight attendants)	7 (7)	4.92 (4.66)
Environmental responsibility	8 (8)	6.65 (6.23)

Source: Ipsos survey of American adults (January 2018)

When Choosing an Airline, Leisure Travelers Value *Affordability* Above All Else

2017 Rankings Identical to 2016 (Schedule Solidly Second, Followed by Reliability)

*When traveling **for personal reasons**, how would you rank the following in terms of choosing **which airline to fly**, with 1 being your first priority and 8 being your last priority?*

(Base = all 2017 flyers with **at least 1 personal leisure trip**)

Criteria	2017 (2016)	Score
Affordability (airfare / ancillaries / taxes)	1 (1)	2.50 (2.65)
Flight schedule (routes, timings)	2 (2)	3.12 (3.23)
Reliability of on-time departure and arrival	3 (3)	4.22 (4.28)
Airline seat comfort	4 (4)	4.54 (4.45)
Customer service (reservation/gate agents, flight attendants)	5 (5)	4.82 (4.95)
Airline frequent flyer program (earn / redeem / upgrade / status)	6 (6)	5.19 (5.00)
Quality of inflight amenities (food / entertainment / WiFi)	7 (7)	5.32 (5.17)
Environmental responsibility	8 (8)	6.28 (6.26)

Source: Ipsos survey of American adults (January 2018)

Airlines for America®

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APPENDIX

Flyers Tend to Be Technologically Savvy

Fraction of 2017 Flyers Indicating Ownership of Various Electronic Devices

Source: Ipsos surveys of American adults (December 2015, January 2017 and January 2018)

One of Every Five Personal Flyers Paid for Airline Ticket With a Debit Card

13% Used an Airline Affinity Card

*When traveling for **personal** reasons, what **form of payment** do you typically use?*

(Share [%] of 2017 Flyers)

Form of Payment	Personal Flyers
Airline affinity card[1]	13
Other credit/charge card[2]	60
Debit card	21
eWallet (aka digital wallet)[3]	3
Cash (travel agency or at airport)	3

Subtotal credit card **73%**

[1] Alaska Airlines Visa Signature, JetBlue Card, United MileagePlus, etc.
[2] American Express, Discover, MasterCard, Visa, etc.
[3] Electronic device that allows individual to make electronic transactions (e.g., Alipay, Apple Pay, Google Wallet, MasterPass, PayPal, Samsung Pay)

Source: Ipsos survey of American adults (January 2018)

At Least 40% of International Travelers Checked Two or More Pieces of Luggage

*When you take the following types of trips, how many pieces of luggage do you usually **check prior** to going through security?*

(Share [%] of 2017 Flyers)

Pieces	Personal Domestic	Personal International	Business Domestic	Business International
0	15	10	19	13
1	60	51	56	44
2	19	31	14	22
3	4	6	9	7
4	2	3	2	14
Average	1.2	1.4	1.2	1.7
Subtotal 2+	**25%**	**40%**	**25%**	**43%**

Source: Ipsos survey of American adults (January 2018)

19% of International Business Flyers Reported Carrying on at Least Three Items

*When you take the following types of trips, how many **carry-on/personal** items do you usually take through security?*

(Share [%] of 2017 Flyers)

Items	Personal Domestic	Personal International	Business Domestic	Business International
0	5	7	7	10
1	64	59	57	50
2	26	29	24	21
3	2	3	9	5
4	2	2	2	14

Subtotal 3+	**4%**	**5%**	**11%**	**19%**

Source: Ipsos survey of American adults (January 2018)

As Expected, Global Entry Program Enrollees Express Significantly Higher Levels of Satisfaction With Respect to Clearing U.S. Customs/Immigration

*Thinking about all your international trips in 2017, how would you rate your satisfaction with **clearing U.S. Customs/Immigration**?*

(Share [%] of 2017 International Flyers)

Rating (1 to 5)	All International	Global Entry	Non-Global Entry
5 – Very satisfied	35	51	29
4 – Somewhat satisfied	37	33	38
3 – Neutral	20	14	22
2 – Somewhat dissatisfied	6	2	7
1 – Very dissatisfied	1	0	1
Not applicable	1	0	2

Mean Rating	**4.0**	**4.3**	**3.9**
Very/somewhat satisfied	**72%**	**83%**	**67%**
Very/somewhat dissatisfied	**7%**	**3%**	**9%**

Source: Ipsos survey of American adults (January 2018)

Global Entry Program Enrollees Also More Satisfied Than Others With Respect to Retrieving Luggage After Clearing U.S. Customs/Immigration

*Thinking about all your international trips in 2017, how would you rate your satisfaction with **retrieving your luggage after clearing U.S. Customs/Immigration**?*

(Share [%] of 2017 International Flyers)

Rating (1 to 5)	All International	Global Entry	Non-Global Entry
5 – Very satisfied	32	45	27
4 – Somewhat satisfied	39	36	40
3 – Neutral	20	14	23
2 – Somewhat dissatisfied	4	3	5
1 – Very dissatisfied	1	1	1
Not applicable	3	1	4

Mean Rating	**4.0**	**4.2**	**3.9**
Very/somewhat satisfied	**71%**	**81%**	**67%**
Very/somewhat dissatisfied	**6%**	**4%**	**7%**

Source: Ipsos survey of American adults (January 2018)

Most Trusted Travelers Learned of Program by Seeing at Airports or Word of Mouth

*How did you **learn** about the TT program in which you're enrolled? (Select all that apply)*

(Share [%] of 2017 Flyers Enrolled in Global Entry or TSA Pre✓®)

Means of Learning About Trusted Traveler Program	2017 Trusted Travelers
Saw TSA Pre✓ lanes or signage at airports	39
Friend / family member / colleague	37
News / social media	24
Message from website of a hotel loyalty program / credit card company / airline	21
Searched specific government website (e.g., TSA.gov, CBP.gov, DHS.gov)	21
Conducted a general internet search (e.g., Bing, Google, Yahoo)	17
Advertising (print or digital)	16
Some other source	6

Source: Ipsos survey of American adults (January 2018)

81% of Trusted Travelers Plan to Renew Their Membership Upon Expiration

Only 4% Say Continuation/Renewal Is "Very Unlikely"

*How likely are you to **continue/renew your membership** to a trusted traveler program when your current enrollment expires?*

(Share [%] of 2017 Flyers Enrolled in Global Entry or TSA Pre✓®)

Rating (1 to 5)	2017 Trusted Travelers
5 – Very likely	57
4 – Somewhat likely	24
3 – Neutral	12
2 – Somewhat unlikely	2
1 – Very unlikely	4

Very/somewhat likely	**81%**
Very/somewhat unlikely	**6%**

Source: Ipsos survey of American adults (January 2018)

Only 14% of Flyers Not Participating in TTs Plan to Enroll in 2018

How likely are you to ***enroll*** *in Global Entry or TSA Pre✓ within the next 12 months?*

(Share [%] of 2017 Flyers *Not* Enrolled in Global Entry or TSA Pre✓®)

Rating (1 to 5)	2017 Non-Trusted Travelers
5 – Very likely	3
4 – Somewhat likely	11
3 – Neutral	25
2 – Somewhat unlikely	19
1 – Very unlikely	42

Very/somewhat likely	**14%**
Very/somewhat unlikely	**61%**

Source: Ipsos survey of American adults (January 2018)

Half of Non-Enrollees Don't Fly Often Enough to Sign Up for TT Programs

Additional 8% Cite Lack of Awareness and 6% Don't Know Where/How to Apply

*What is the **primary** reason you are **not enrolled** in either of these expedited screening programs?*

(Share [%] of 2017 Flyers *Not* Enrolled in Global Entry or TSA Pre✓®)

Reason Not Enrolled in Global Entry or TSA Pre✓	2017 Non-TT Flyers
I don't travel often enough to justify the time and money to enroll	52
The application fee ($85 for 5-year Pre✓, $100 for 5-year Global Entry) is too high	12
I'm not aware of these programs or their benefits	8
The regular (non-expedited) lanes at TSA/Customs are fast enough for me	7
I don't know how/where to apply	6
It's too difficult/cumbersome to enroll in the program[1]	5
I choose not to share biometric or other personal information with the government	3
I haven't been able to get a convenient appointment time	3
I'm not eligible to apply (e.g., non-permanent U.S. resident)	1
Other	2

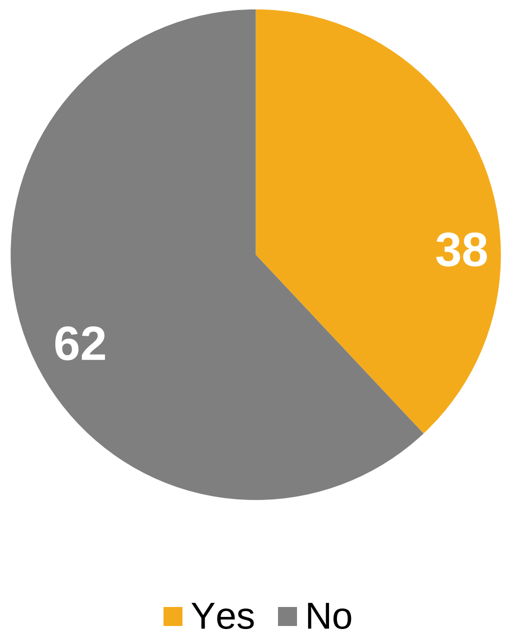
[1] Application process, location of enrollment center, time required to spend in person at enrollment center, etc.

Source: Ipsos survey of American adults (January 2018)

38% of Flyers Originated From Airport-Other-Than-Closest at Least Once in 2017

*For **any** of your airline trips in 2017, did you fly from an airport that was **not the closest** airport to your home or office?*

(Share [%] of 2017 Flyers)

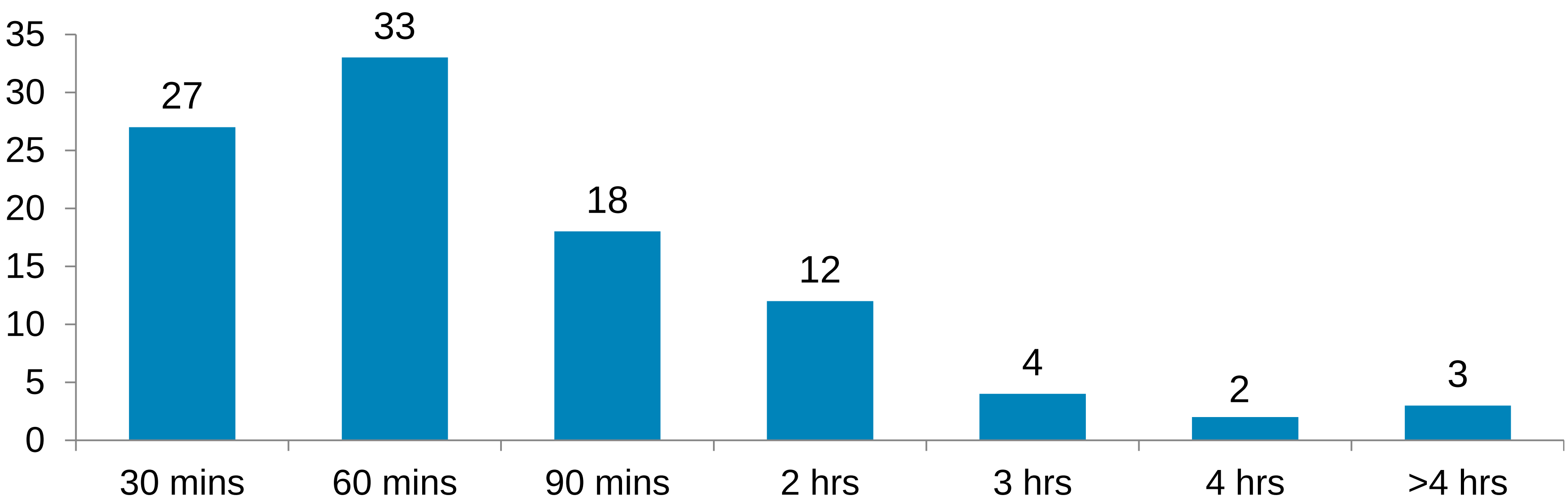


Source: Ipsos survey of American adults (January 2018)

12% of Americans Are Willing to Drive as Far as Two Hours to Get Cheaper Flight

*Assuming you have decided to travel by air and have a choice of originating airports, **how far** (measured in travel time from home or work to the airport) are you **willing to journey** by car/bus/train for a cheaper flight?*

Percent of All Americans Willing to Travel up to X



Source: Ipsos survey of American adults (January 2018)

Price and Schedule Are Top Factors for Choosing a More Distant Origin Airport

Frequent Flyer Programs, Airport Amenities/Navigation Are Secondary Considerations

*When choosing an **airport other than the one closest** to your home or office, what are the most important **factors** for doing so, with 1 being the most important and 5 being the least important?*

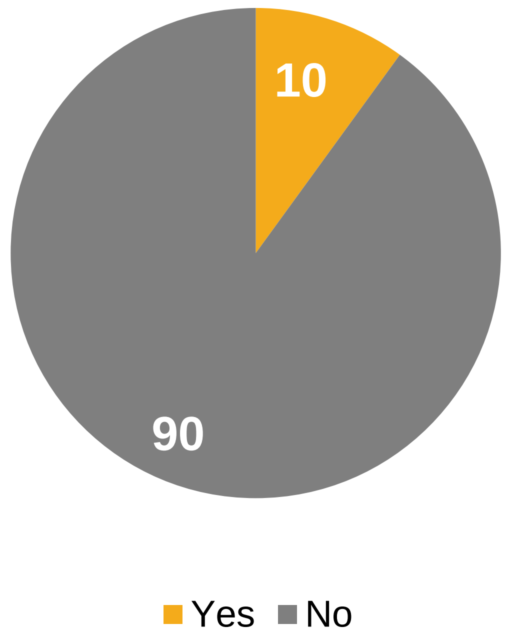
Rank	Ticket Price	Flight Schedule	FFP	Airport Amenities	Ease of Airport Navigation
1	51	22	11	7	9
2	20	43	12	13	13
3	10	17	21	20	32
4	9	10	20	33	28
5	10	8	37	27	18
Mean	**2.1**	**2.4**	**3.6**	**3.6**	**3.3**
Subtotal Top 2	**71%**	**65%**	**22%**	**20%**	**22%**

Source: Ipsos survey of American adults (January 2018)

10% of Flyers Reported Purchasing a Voluntary Carbon Offset at Least Once in 2017

*For **any** of your airline trips in 2017, did you purchase a **voluntary carbon offset**?*

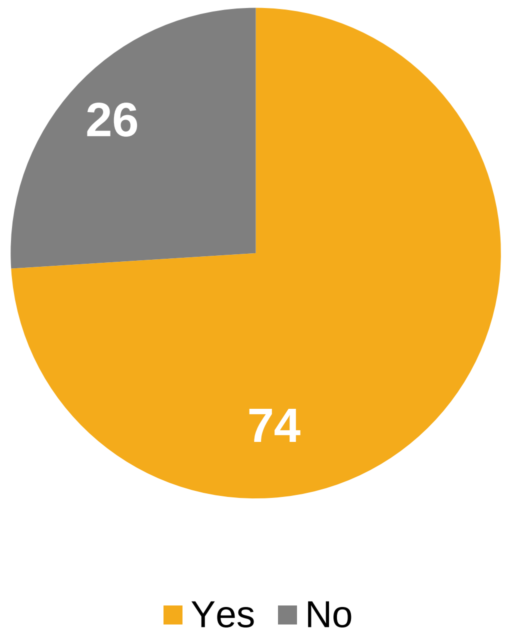
(Share [%] of 2017 Flyers)



Source: Ipsos survey of American adults (January 2018)

The Vast Majority (74%) of Complaints to U.S. Airlines Are Resolved Satisfactorily

In 2017, if you submitted a complaint directly to a U.S. airline, did the airline address your complaint satisfactorily?



Source: Ipsos survey of American adults (January 2018)

END OF APPENDIX