



Airlines for America[®]

We Connect the World

Air Travelers in America

Key Findings of a Survey Conducted by Ipsos

March 2026

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About Ipsos

- Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing nearly 20,000 people. Ipsos serves more than 5,000 clients across the world.
- Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120, Mid-60 indices, and is eligible for the Deferred Settlement Service (SRD).
- ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

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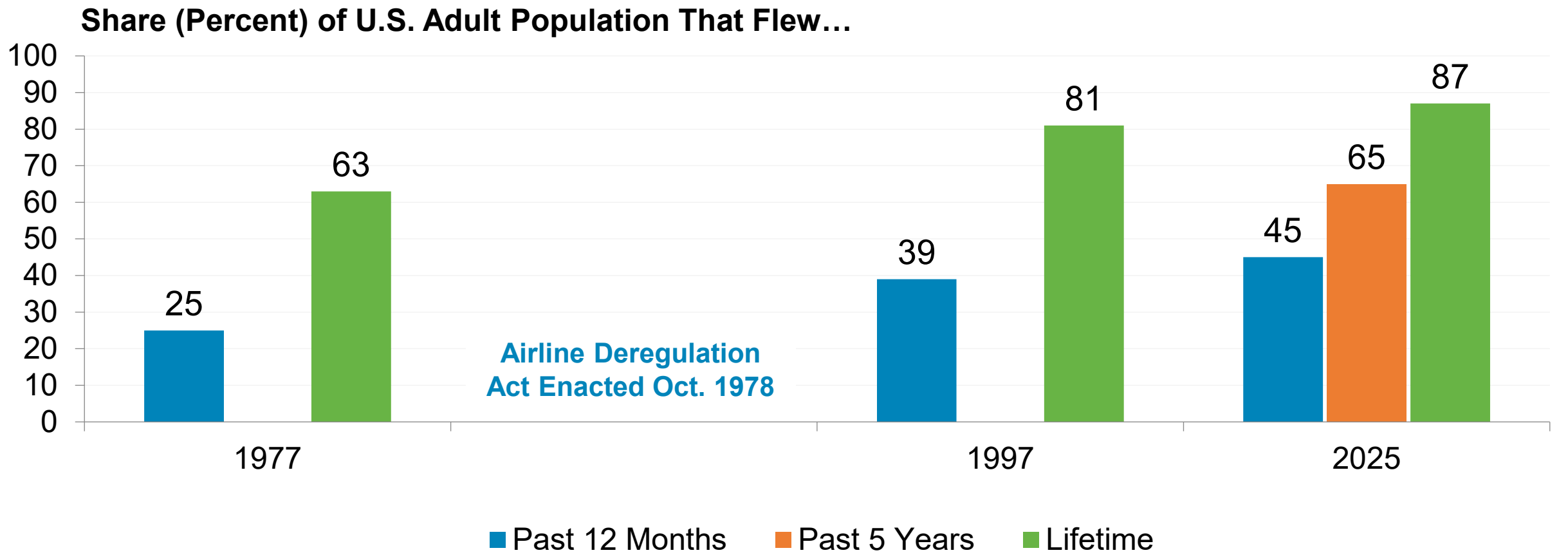
Ipsos Research Approach and Poll Accuracy

These are some of the findings of an Ipsos poll conducted **Jan. 5-19, 2026**, on behalf of Airlines for America®. The poll screened a **national sample of 3,847 American adults** (age 18 or older) to identify those who have “ever flown on an airplane” via Ipsos’s probability-based **KnowledgePanel®** (“KP”). Of these, 3,380 respondents qualified for and completed the survey.

- The **margin of sampling error** for this study is plus or minus 1.61 percentage points at the 95% confidence level, for results based on the entire sample of adults and plus or minus 1.71 percentage points at the 95% confidence level for results based on those who have ever flown on a plane. The margin of sampling error takes into account the **design effect**, which was 1.04 and 1.03, respectively. The margin of sampling error is higher and varies for results based on other sub-samples. In reporting of the findings, percentage points are rounded off to the nearest whole number.
- The survey was **conducted using KP, the largest and most well-established online probability-based panel that is representative of the adult U.S. population**. The recruitment process employs a scientifically developed addressed-based sampling methodology using the latest Delivery Sequence File of the USPS. Households invited to join the panel are randomly selected from all available households in the U.S. Persons in the sampled households are invited to join and participate in the panel. Those selected who do not already have internet access are provided a tablet and internet connection at no cost to the panel member. Those who join the panel and who are selected to participate in a survey are sent a unique password-protected log-in used to complete surveys online. Samples from KP cover all households regardless of their phone or internet status and findings can be reported with a margin of sampling error and projected to the general population.
- The data for the total sample were weighted to adjust for gender by age, race/ethnicity, Census region, metro-status, education, and household income. The **demographic benchmarks** came from the 2025 March Supplement of the Current Population Survey.

As Air Travel Has Become Safer and More Affordable, More Americans Have Taken to the Skies

Almost Nine in Ten Americans Have Flown Commercially; 45% Flew in 2025

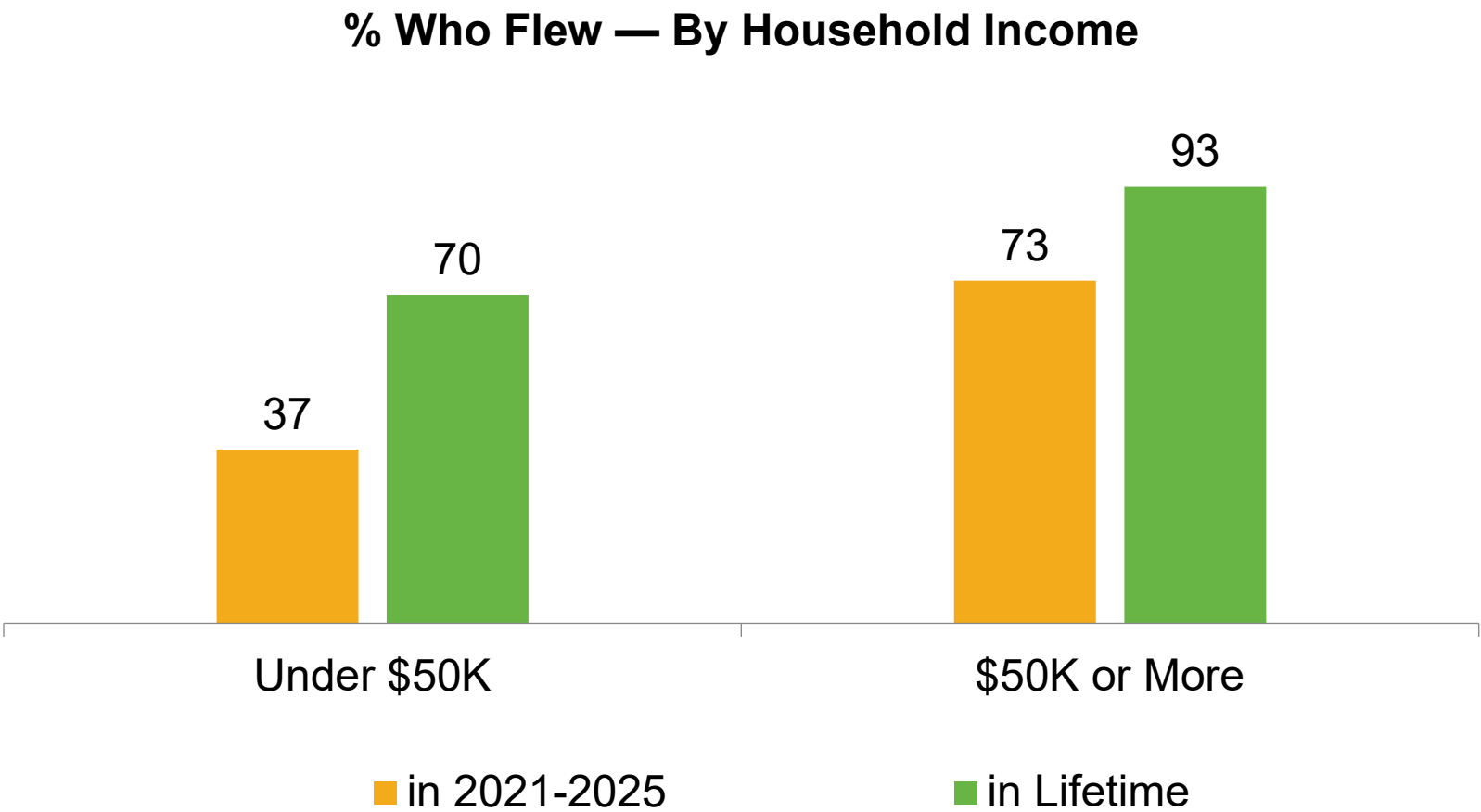


Sources: Historical A4A air travel surveys conducted by Gallup (1971 through 1997) and Ipsos

Note: "Past 5 Years" category was not presented as a possible response preceding 2020.

70% of Americans With Household Incomes Under \$50K Have Flown

37% of Americans With Household Incomes Under \$50K Have Flown in the Past Five Years

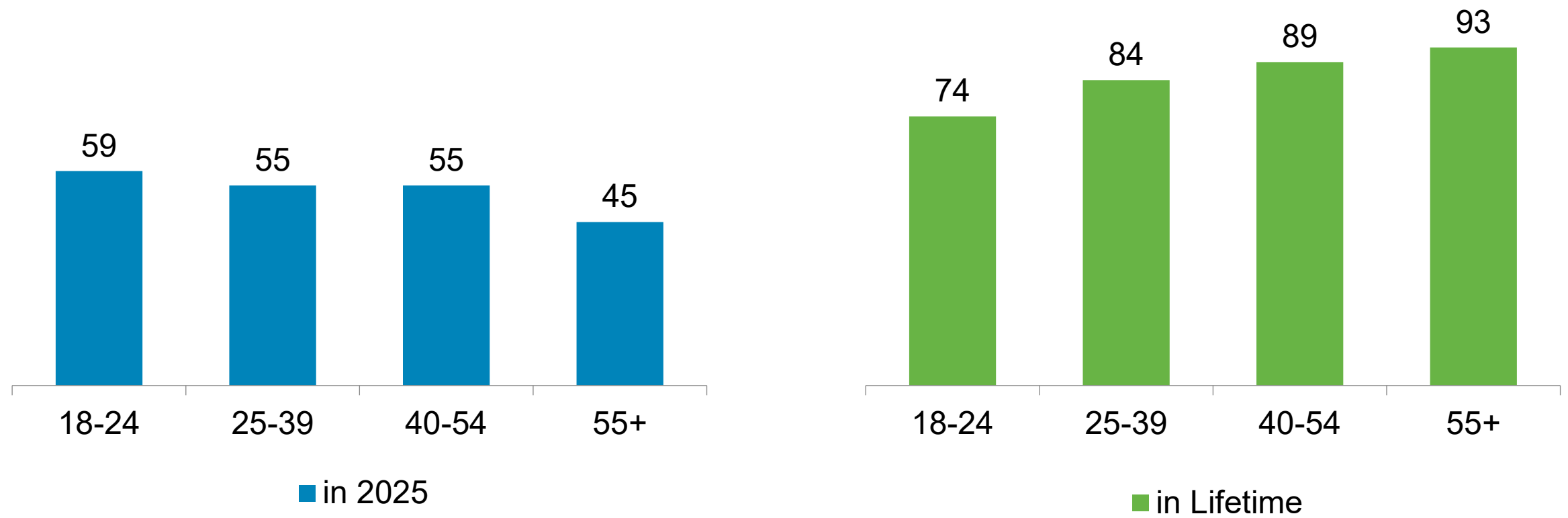


Source: A4A Air Travel Survey conducted by Ipsos (January 2026) Note: According to the U.S. Census Bureau, in 2024, 30% of American households had annual incomes under \$50,000; the median was \$83,730.

Among American Adults, Those Age 18-24 Had the Highest Propensity to Fly in 2025

74% of Young Adults and 93% of Older Adults Have Flown at Least Once in Their Lifetimes

Share (Percent) of U.S. Adult Population That Flew — By Age Group

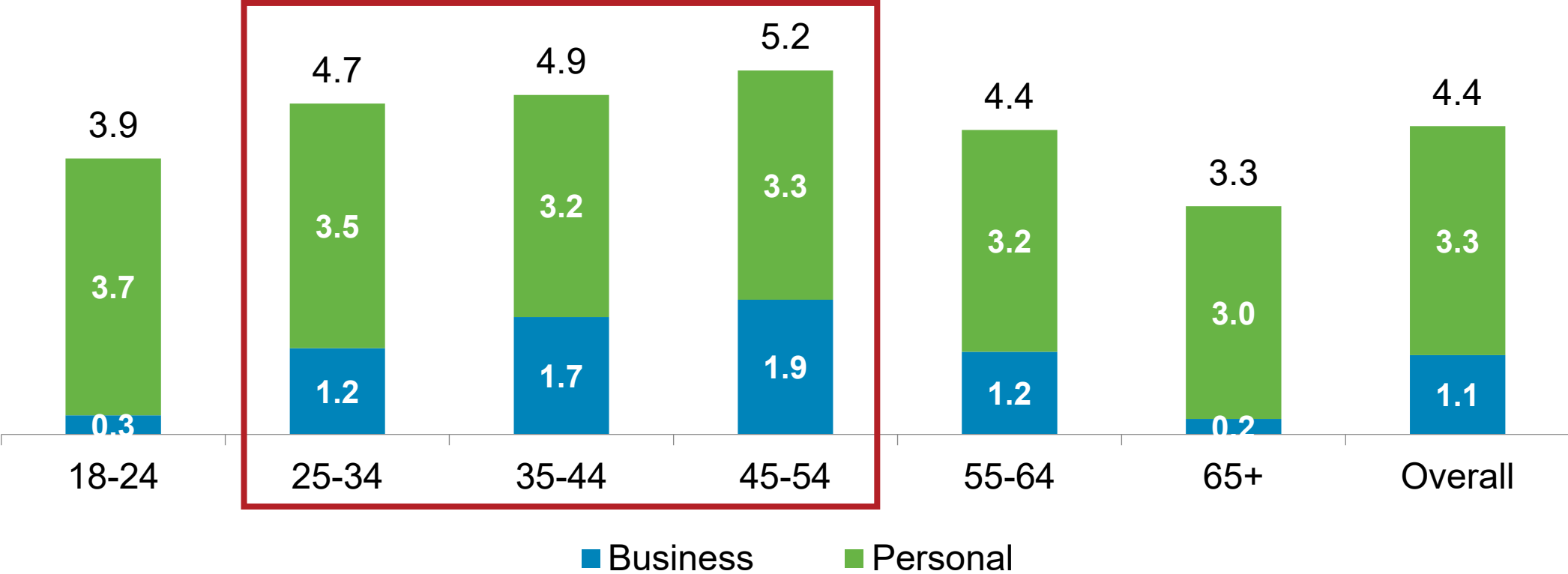


Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

In 2025, Those in Prime Working Age Took the Most Business Trips and Overall Trips

Flyers Between 45 and 54 Years Old Averaged 5.2 Trips (1.9 Business + 3.3 Personal)

Average (Mean) Air Trips in 2025 — By Age Group and Trip Purpose

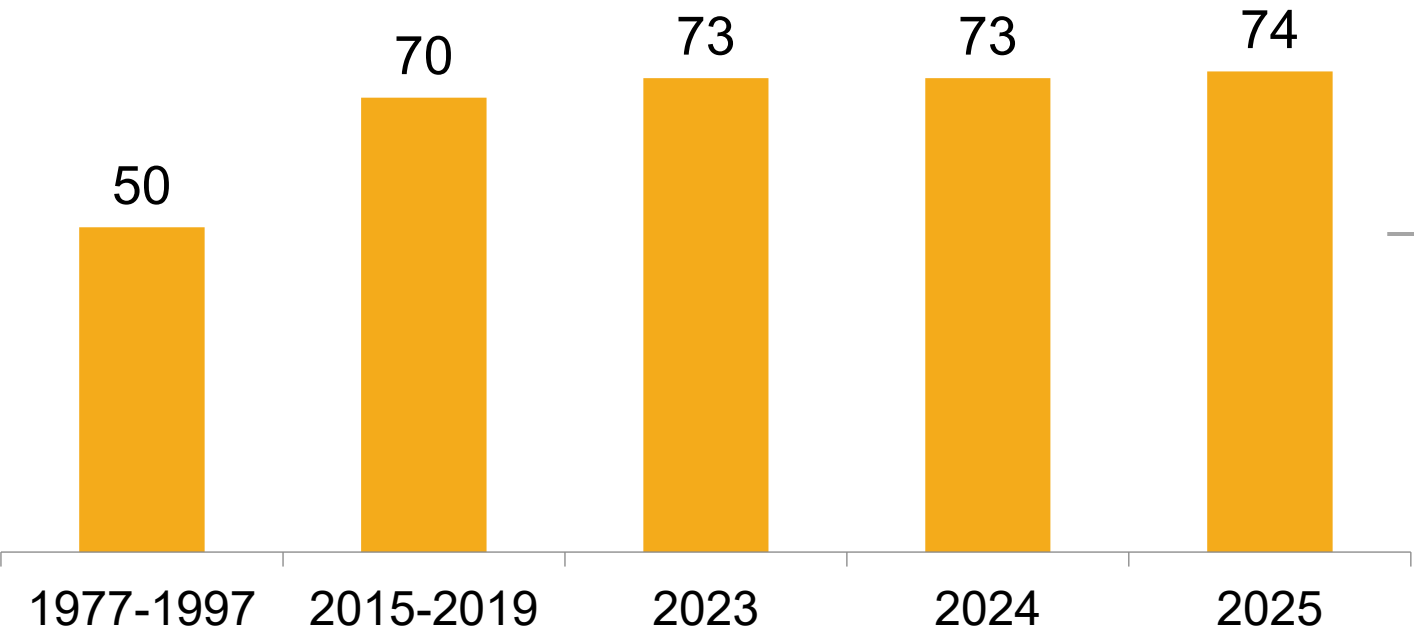


Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

Americans Fly Primarily for Personal Reasons

More Than 70% of Air Trips

Approximate Personal* Share (Percent) of Trips



Trips	Business	Personal
DOM	0.96 (22%)	2.33 (53%)
INT	0.19 (4%)	0.96 (21%)
Total	1.15 (26%)	3.29 (74%)

Note: Totals may not add to 100 due to rounding

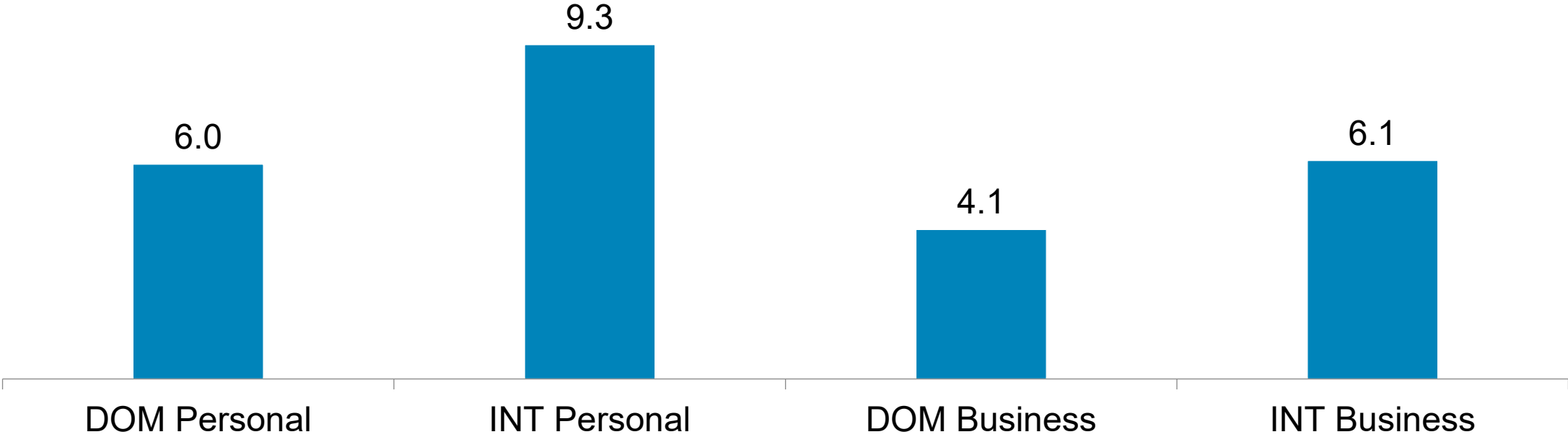
Source: A4A Air Travel Survey conducted by Ipsos (2015-Present) and Gallup (1977-1997)

* Includes leisure/recreation as well as traveling to/from college, family event, job interview, funeral, medical matters, etc.

As Expected, Flyers Spend the Most Nights on International Trips Taken for Personal Reasons

Domestic Business Trips Average the Fewest Nights

*In 2025, on average, for the following types of trips, **how many nights** did you stay at your destination when you took the following types of trips?*



Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

* Includes leisure/recreation as well as traveling to/from college, family event, job interview, funeral, medical matters, etc.

Over the Past Five Years, a Large Share of Flyers Experienced a Lower-Cost Airline

18% of Americans Flew a Foreign-Flag Carrier on at Least One Personal Trip

*In the past five years, when traveling **for personal reasons**, which of the following **types of airlines** did you fly? (Check all that apply)*

Airline Group	%
American, Delta, United	76
Alaska, Hawaiian, JetBlue, Southwest	46
Allegiant, Avelo, Breeze, Frontier, Spirit, Sun Country	22
Cape Air, Silver Airways, other U.S. airlines	4
Non-U.S. airline (e.g., Air Canada, Aeromexico, British Airways, JAL)	18

Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

Price and Schedule Remain the Dominant Considerations When Picking Flights

Loyalty Program Benefits and Airline Customer Service Are Secondary Factors

When choosing flights offered by multiple airlines, which criteria are the three most important to you?

Criteria for Choosing Among Flights	Rank	% Ranking in Top 3
Ticket price/value	1	87
Schedule convenience	2	78
Loyalty/frequent flyer program points/miles/perks	3	33
Airline customer service (no change fees, helpfulness, etc.)	4	32
Personal space associated with airplane seat	5	30
Perception of airline’s safety record/reputation	6	21
Availability/quality of inflight Wi-Fi/entertainment	7	7
Availability/quality of food/beverage service	8	4
Perception of airline’s environmental record/reputation	9	4

Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

At Airports, Flyers Care Most About Restrooms and Time to Get From Curb to Gates/Lounges

Dining Options (Food Quality/Choice) Were Also Important to Survey Respondents

*Which are the three most important factors in determining whether you have a **positive experience** at an airport?*

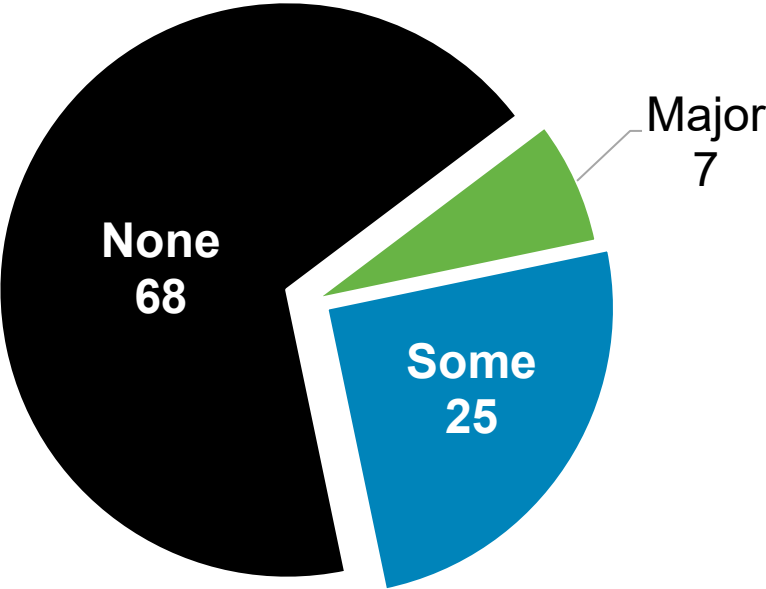
Criteria for Airport Satisfaction	Rank	% Ranking in Top 3
Quality/cleanliness of restrooms	1	51
Distance/time from curb/security to gate/lounge	2	48
Food quality/choice	3	39
Transit access	4	28
Plentiful outlets/ports (at gates or lounges)	5	27
Lounge quality/availability	6	25
Wi-Fi speed/reliability	7	25
Capacity/convenience of parking garages	8	23
Architecture/aesthetics/art	9	6

Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

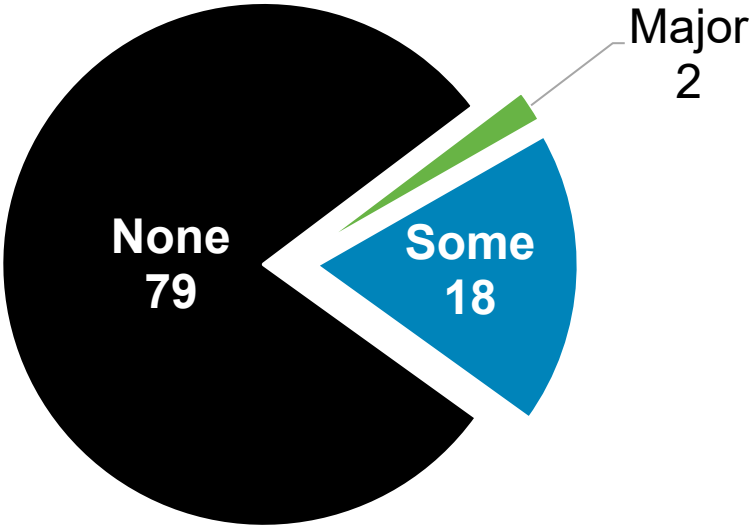
Social Media Influences Destination for 32% of Leisure Flyers and Number of Trips for 20%

*In 2025, regarding the trips you took for **leisure**, to what extent did **social media** (e.g., influencers, company ads, family/friend posts, etc.) **influence** your choice of destination / number of trips taken?*

Impact on Destination



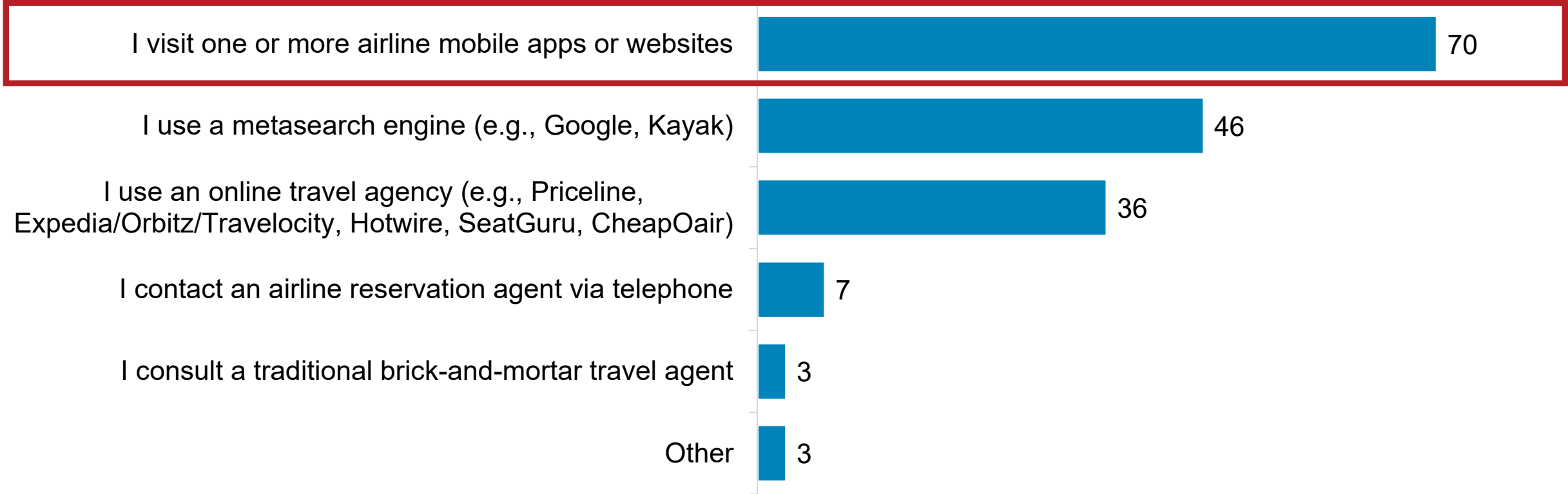
Impact on # of Trips



Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

Of Those Flying for Personal Reasons, 70% Visit One or More Airline Mobile Apps or Websites to Research Air Travel Options Prior to Making a Purchase

*When traveling for **personal reasons**, which of the following options below do you generally consult when **researching air travel options** before making a final purchase? (select all applicable)*

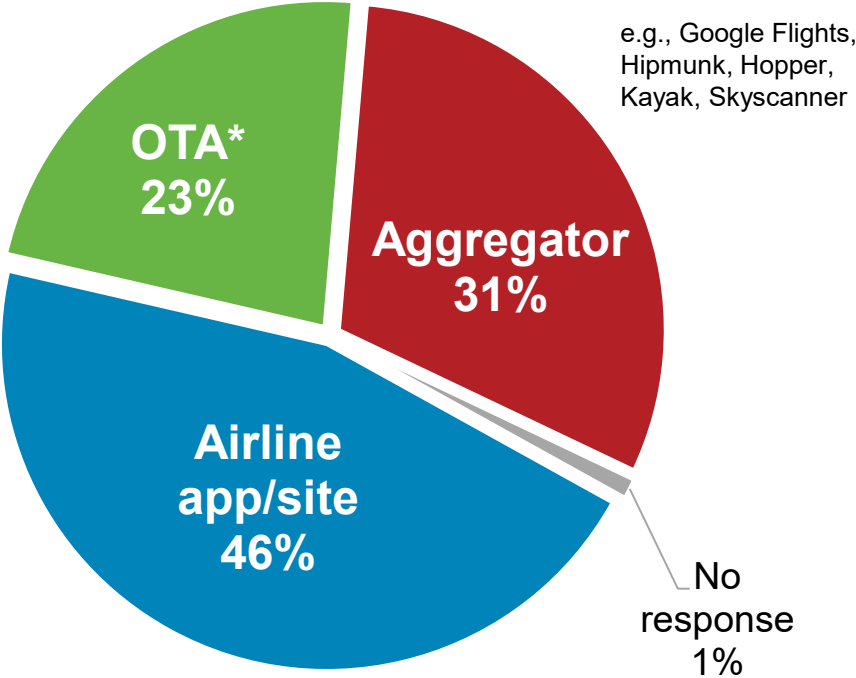


Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

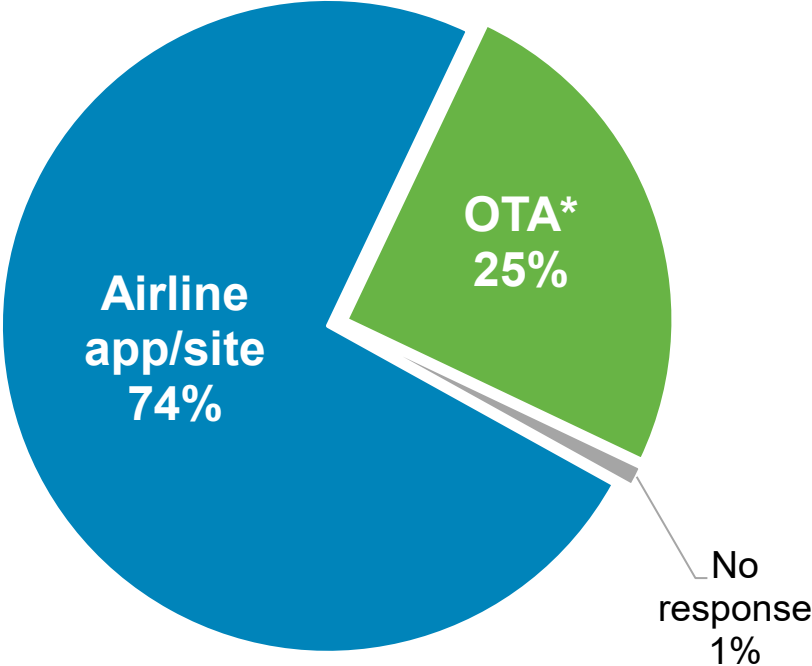
When Purchasing Flights Online, More Than 75% Prefer Airline Apps or Websites

When Shopping for Flights Online, 47% of Consumers Prefer Airline Apps or Websites

When **searching/comparison-shopping** for air travel **online**, which of these options do you typically prefer?



When **purchasing** air travel **online**, which of these options do you typically prefer?

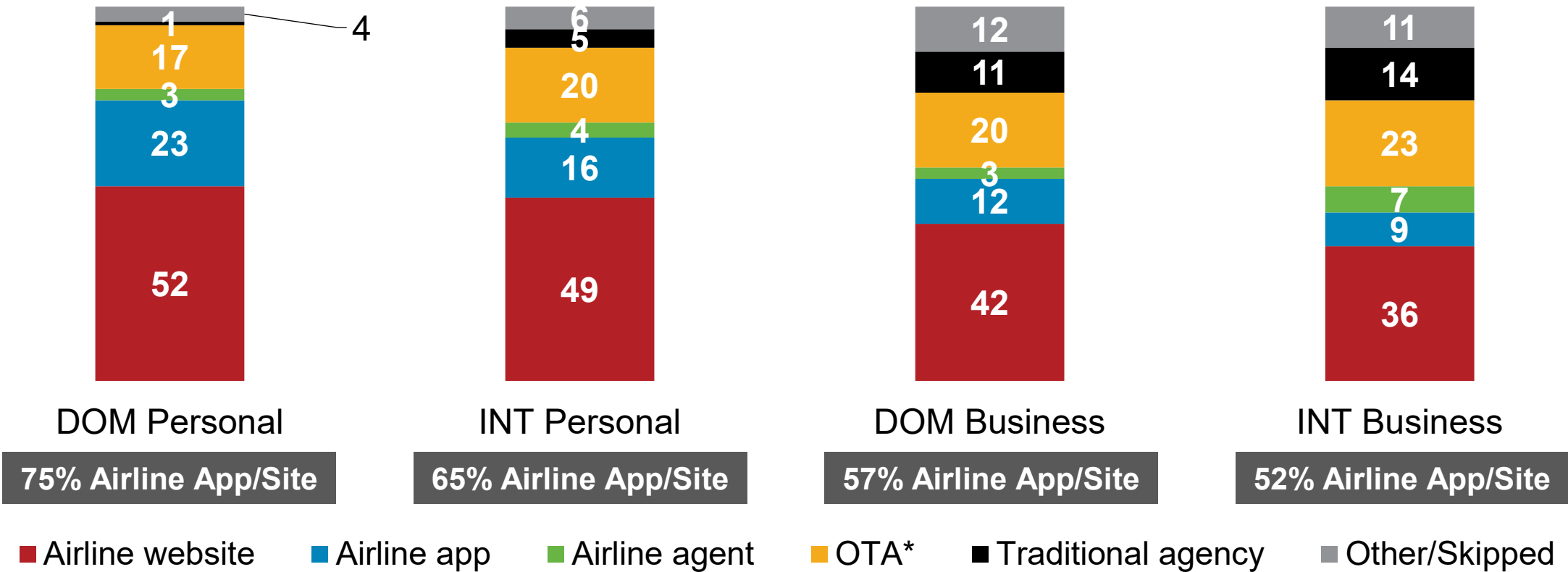


Source: A4A Air Travel Survey conducted by Ipsos (January 2026) * Online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair) Note: Totals may not add to 100 due to rounding.

Airline Apps/Sites Are the Most Commonly Used Distribution Channels to Book Personal Trips

Airline Apps/Sites Used to Book 75% of Domestic Personal Trips, 65% of International Personal Trips

Which resource do you typically use to book your flight?



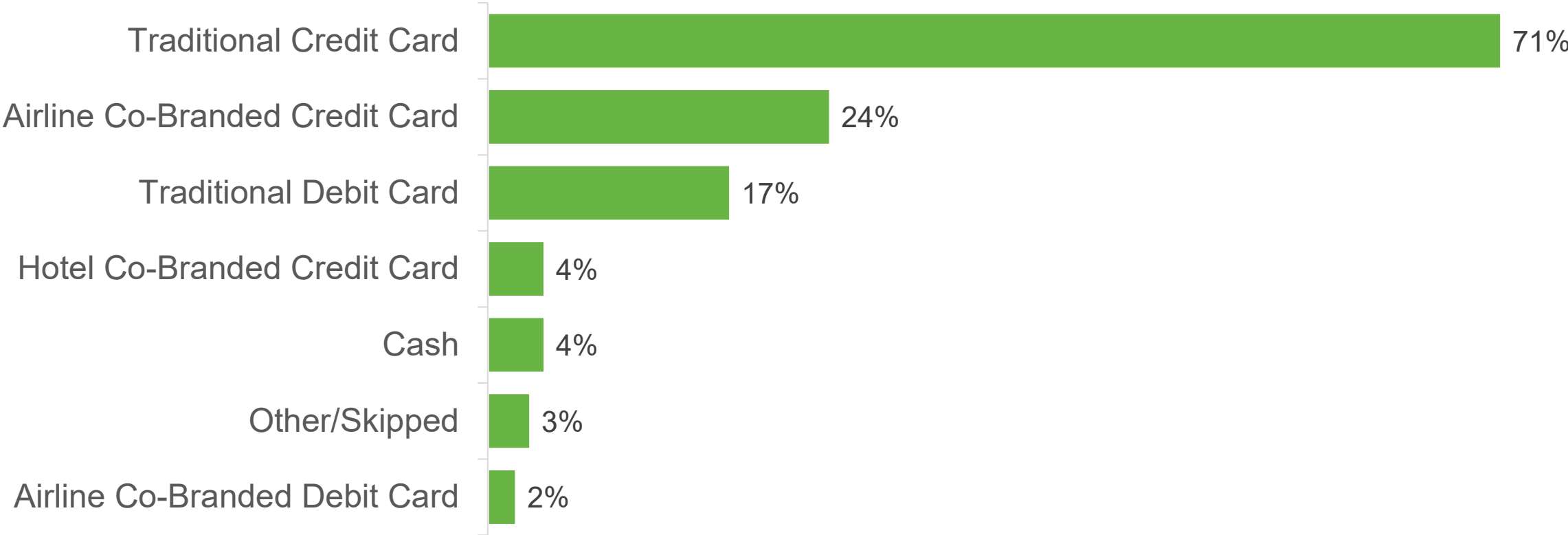
Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

* Online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair)

A Fourth of Personal Travelers Typically Use an Airline Co-Branded Card to Purchase Flights

Traditional (Non-Co-Branded) Credit Cards Are the Most Common Form of Payment

When traveling for **personal reasons**, what **forms of payment** do you typically use? (Check all that apply)



Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

In 2025, 82% of Flyers Checked in Prior to Arriving at the Airport—Versus 52% in 2019

Two-Thirds of Flyers Check in Using Mobile Devices

How did you most commonly **check in** for trips?

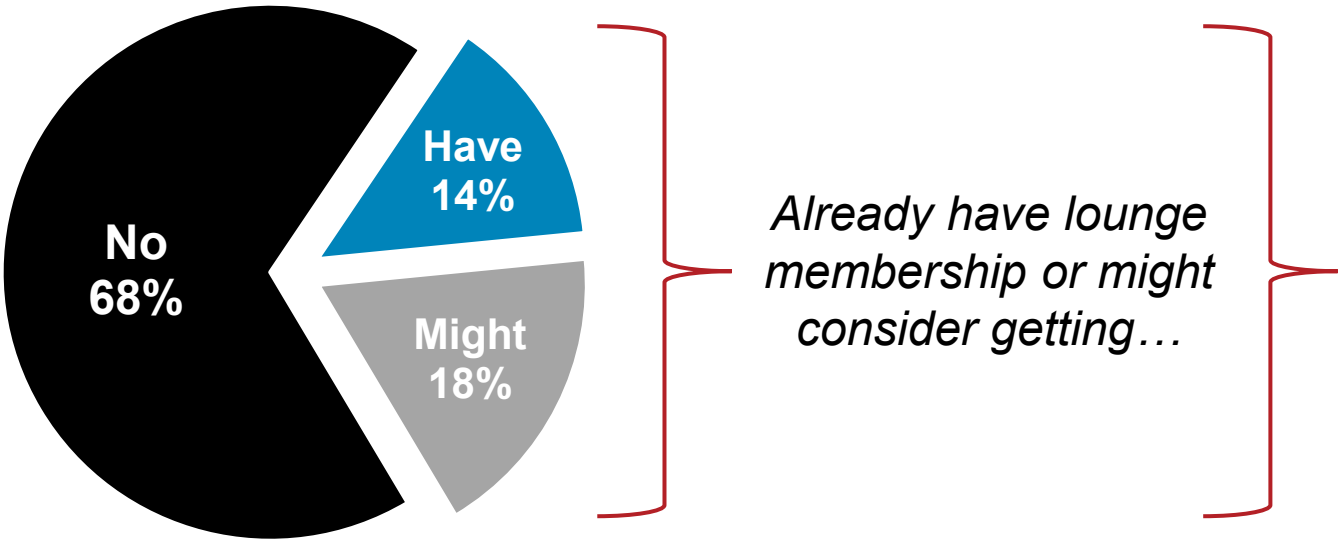
Typical Means of Checking In	2019 %	2024 %	2025 %	2025 vs. 2019
Mobile device/app	29	60	66	+ 37
Airline website	23	20	16	- 7
Subtotal before airport	52	80	82	+ 30
Airport kiosk or ticket counter	43	18	15	- 28
Airport skycap (curbside)	4	1	2	- 2
Subtotal at airport	47	19	17	30
Other/skipped	1	1	1	—

Source: A4A Air Travel Survey conducted by Ipsos

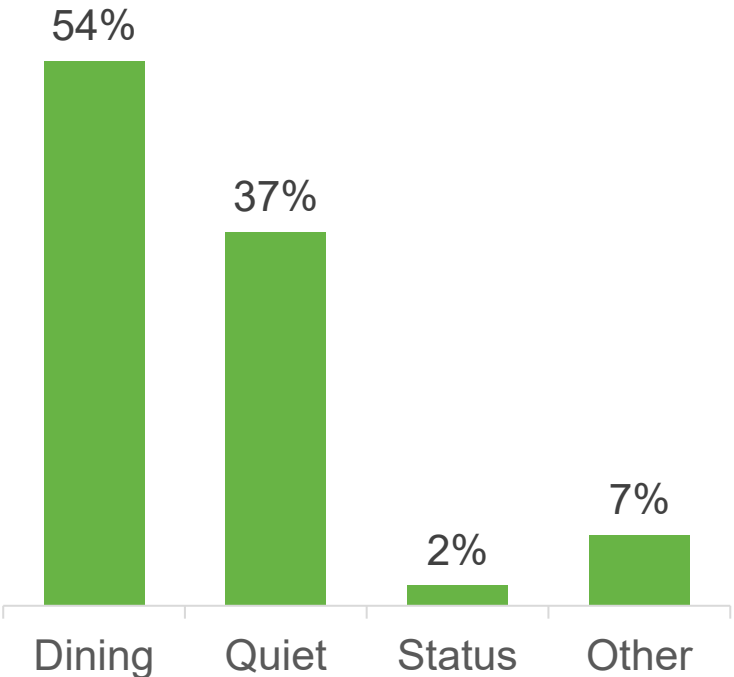
Note: Totals may not add to 100 due to rounding.

More Than 30% of Flyers Have Had Airline/Airport Lounge Membership in Past Five Years or Would Consider Signing Up, Primarily Due to Food and Beverage Options/Availability

*Have you had a **membership to an airline/airport lounge** in the past five years, or might you consider signing up for one in the next five years?*



*For the 32% who already have or might consider lounge membership, what is the **primary factor** driving that decision?*

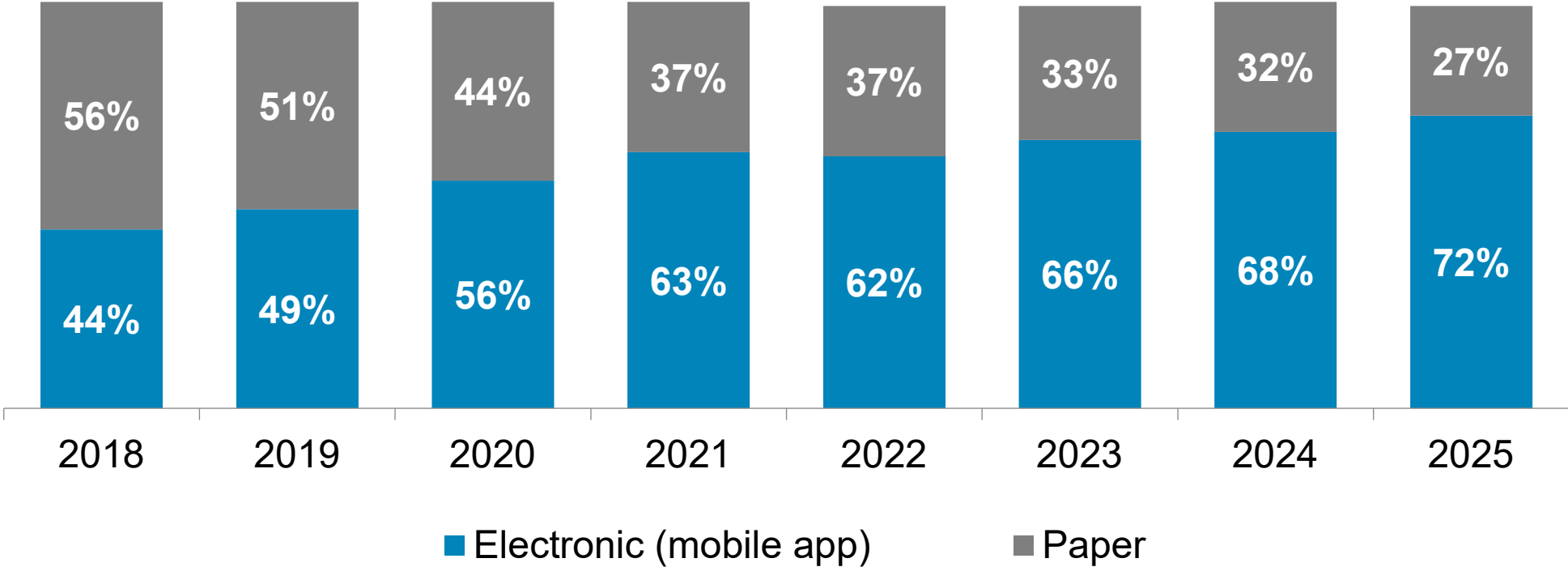


Source: A4A Air Travel Survey conducted by Ipsos (January 2026) Note: Totals may not add to 100 due to rounding.

More Than 70% of Flyers Use Their Mobile Devices to Board the Aircraft

Use of Electronic Boarding Passes Rose 28 Points From 2018 to 2025

*At the gate, which **type of boarding pass** do you typically use?*



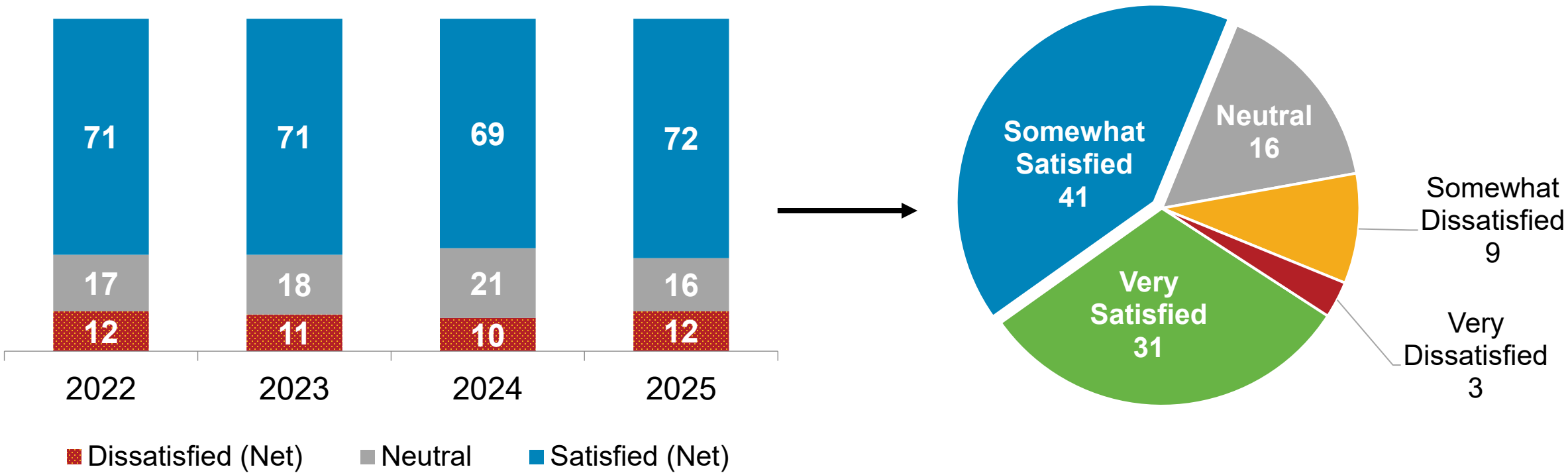
Source: A4A Air Travel Survey conducted by Ipsos

Note: Totals may not add to 100 due to rounding.

72% of Flyers Reported Being Satisfied With Their Overall Air-Travel Experience in 2025

16% Were Neutral; Only 3% Reported Being “Very Dissatisfied”

Thinking about your **overall experience** with air travel, how **satisfied or dissatisfied** are you?

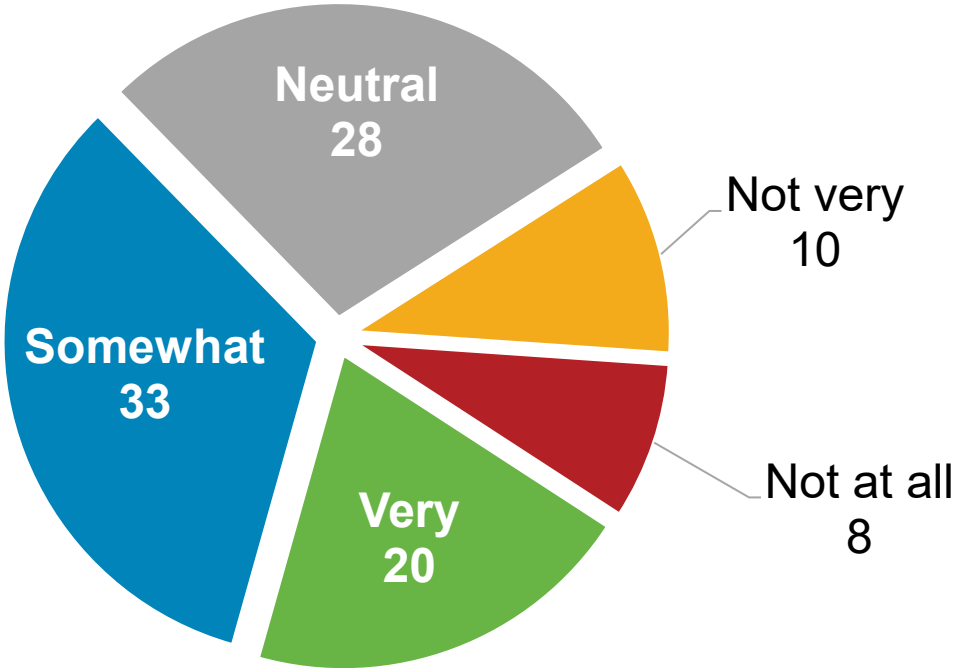


Source: A4A Air Travel Survey conducted by Ipsos (January 2023/2024/2025/2026)

More Than Half of Flyers Care About Airlines’ Environment-Friendly Practices/Operations

Only 8% Reported “Not at All Important”

*How important is it to you personally that airlines be committed to **environmentally friendly / sustainable practices** in their day-to-day operations (e.g., fuel efficiency / eco-friendly planes / use of sustainable aviation fuel, recycling programs, reducing waste and/or single-use plastics)?*

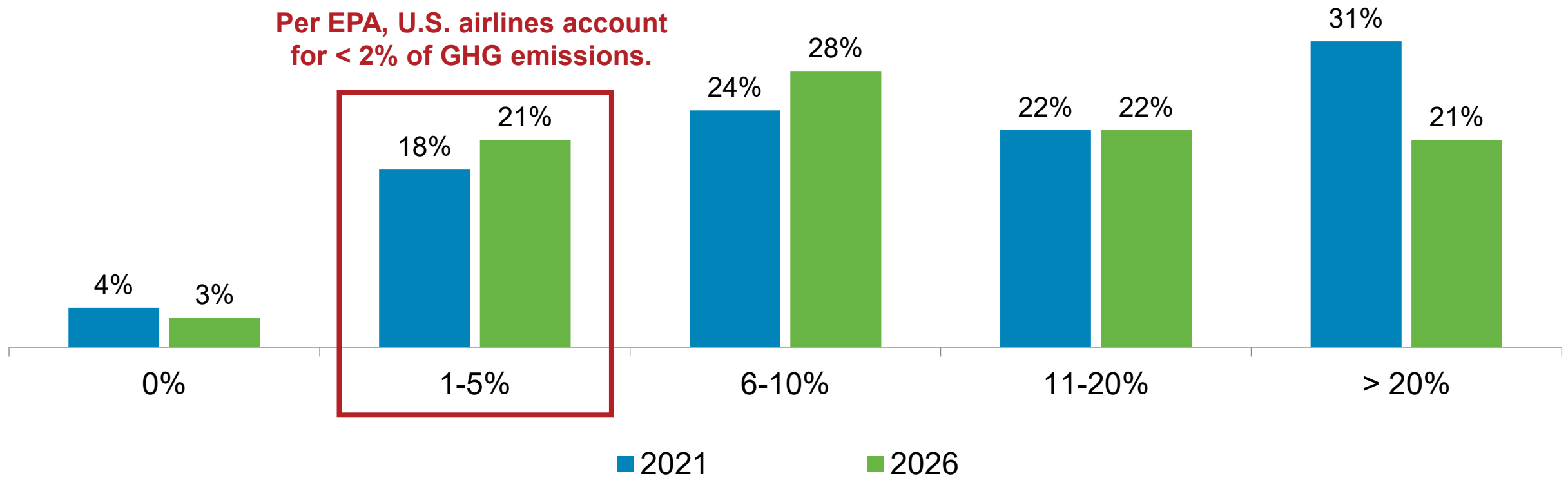


Source: A4A Air Travel Survey conducted by Ipsos (January 2026)

More Than 70% of Travelers Surveyed Overestimate Airlines' Share of U.S. GHG Emissions

One of Every Five Respondents Thinks Airlines Account for More Than 20% of GHG Emissions

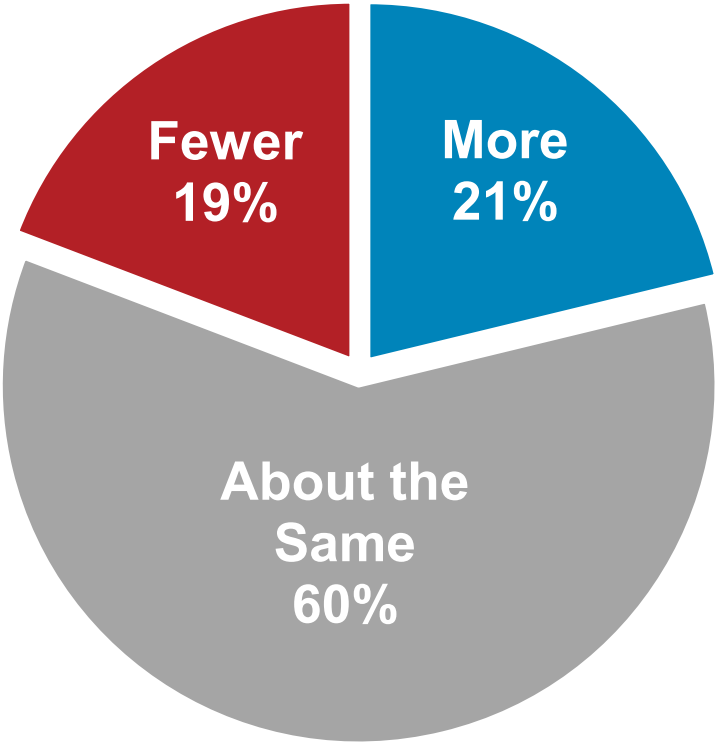
What *portion of U.S. greenhouse gas (GHG) emissions* do you think U.S. airlines are responsible for?



Source: A4A Air Travel Survey conducted by Ipsos (January 2021/2026) Note: Totals may not add to 100 due to rounding.

About 80% of 2025 Flyers Plan to Take at Least as Many Trips for Personal Reasons in 2026

*Which of the following describes your **expectation** for your **personal air travel** in 2026?*



Source: A4A Air Travel Survey conducted by Ipsos (January 2026)



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