



Airlines for America[®]

We Connect the World

Air Travelers in America

Key Findings of a Survey Conducted by Ipsos

February 2022

About Ipsos

- » Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people. Ipsos serves more than 5,000 clients across the world.
- » Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and the Mid-60 index 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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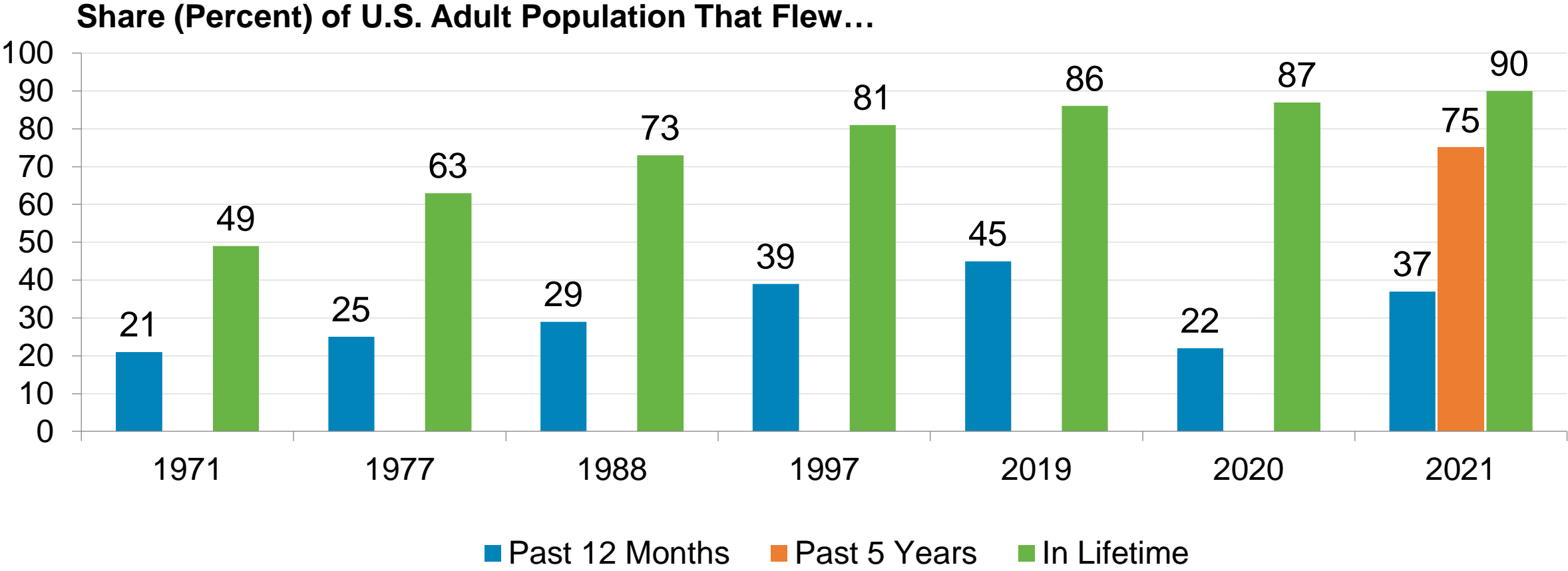
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Ipsos Research Approach and Poll Accuracy

- » This presentation contains some of the findings of an [Ipsos](#) poll conducted between February 3-17, 2022, on behalf of [Airlines for America](#). For this survey, a sample of 10,000 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English.
- » The sample for this study was randomly drawn from Ipsos’s online panel (see link below for more info on “Access Panels and Recruitment”), partner online panel sources, and “river” sampling (see link below for more info on the Ipsos “Ampario Overview” sample method) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a 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, race/ethnicity, region, and education.
- » Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. The precision of Ipsos online polls is measured using a [credibility interval](#). In this case, the poll has a credibility interval of plus or minus 1.2 percentage points for all Americans. 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=10,000, DEFF=1.5, adjusted Confidence Interval=+/- 2.7 percentage points).

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

90% of the U.S. Population Has Flown Commercially

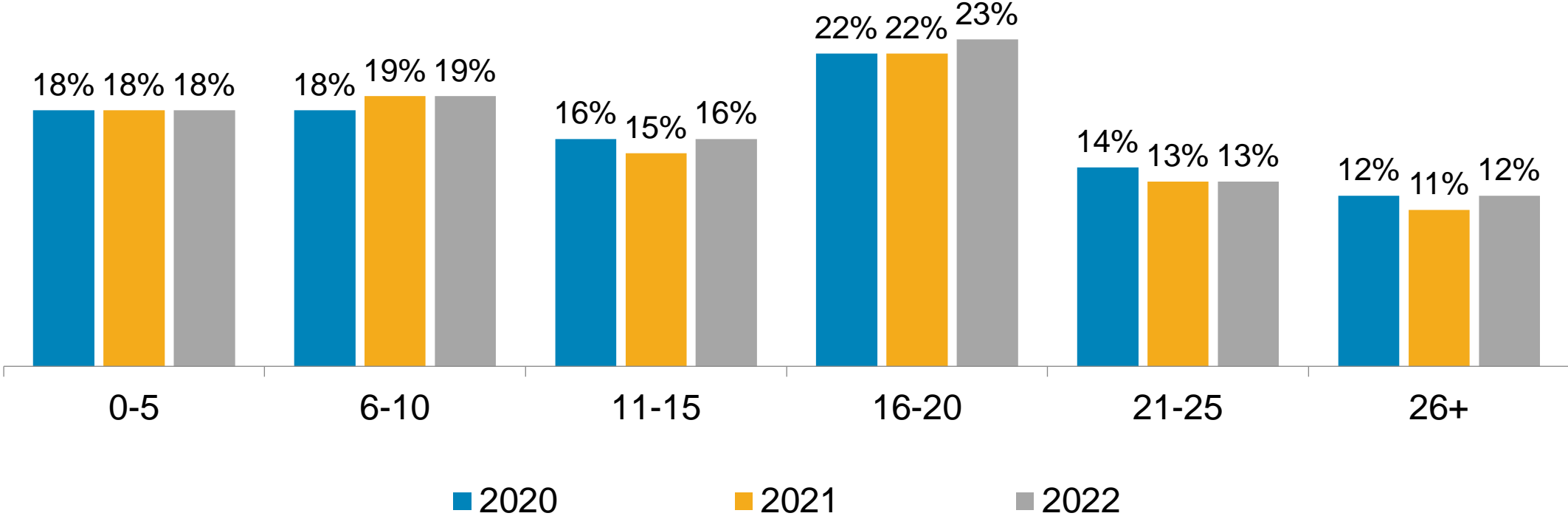


Sources: Historical A4A air travel surveys conducted by Gallup and Ipsos

More Than Half of Americans Report Having Flown Before Their 16th Birthday

Three Out of Four Flew Prior to Age 21

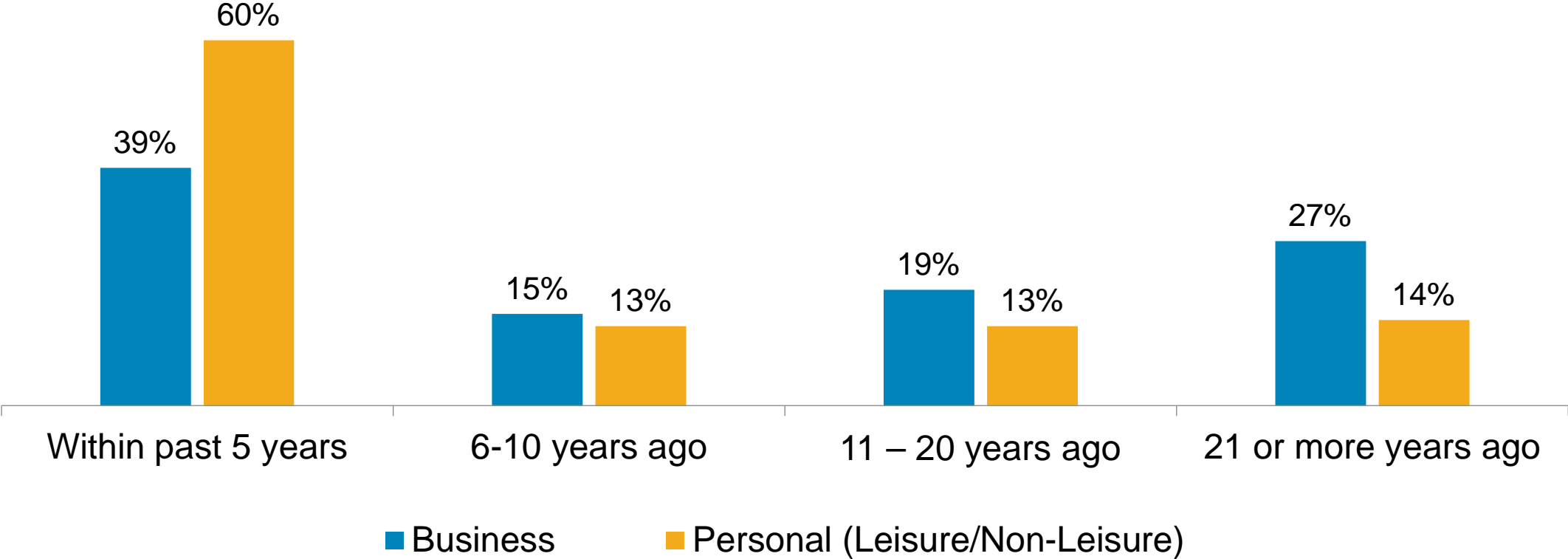
How old were you (in years) when you took your first flight?



Source: A4A Air Travel Survey conducted by Ipsos

Of Those Who Did Not Fly in 2021, 60% Flew for Personal Reasons and 39% Flew for Business Within the Past Five Years

If you didn't fly in 2021, when was the last time you flew on an airline for business/personal reasons?



Source: A4A Air Travel Survey conducted by Ipsos

Overall, When Choosing Which Flight to Take, Price Is the Dominant Consideration

Nearly Half of Respondents Ranked Ticket Prices Number One

In choosing among flights, which of the following criteria are most important to you? Please rank the following criteria, with 1 being the most important to you and 6 being the least most important to you?

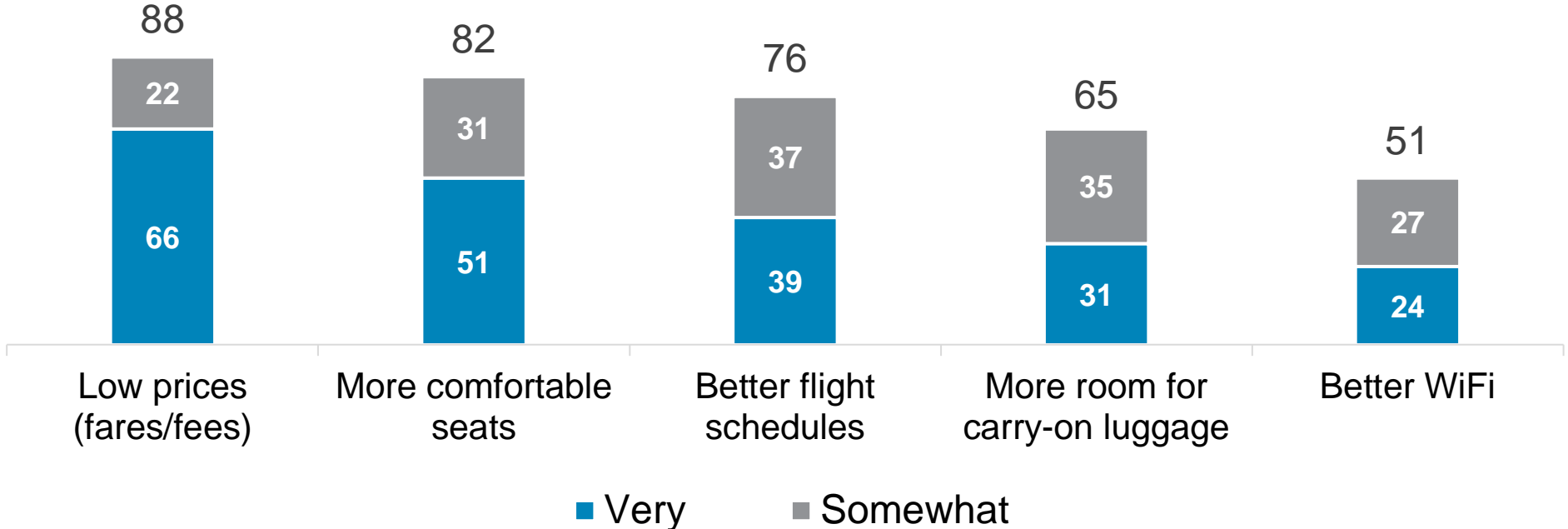
| 2021 Flyers | Overall Rank | Mean Score | % of Respondents Ranking #1 |
|---|---------------------|-------------------|------------------------------------|
| Ticket price/value | 1 | 2.15 | 46 |
| Nonstop flight option (vs. connecting) | 2 | 2.60 | 25 |
| Departure/arrival time | 3 | 2.68 | 17 |
| Percentage of seats that are occupied | 4 | 4.33 | 4 |
| Availability/quality of inflight WiFi/entertainment | 5 | 4.57 | 4 |
| Availability/quality of food/beverage service | 6 | 4.67 | 4 |

Source: Ipsos survey of American adults (February 2022)

Customers Continue to Want Low Prices Above All Else

If you could change anything about commercial air travel over the next two years, how important would you rate each of the following?

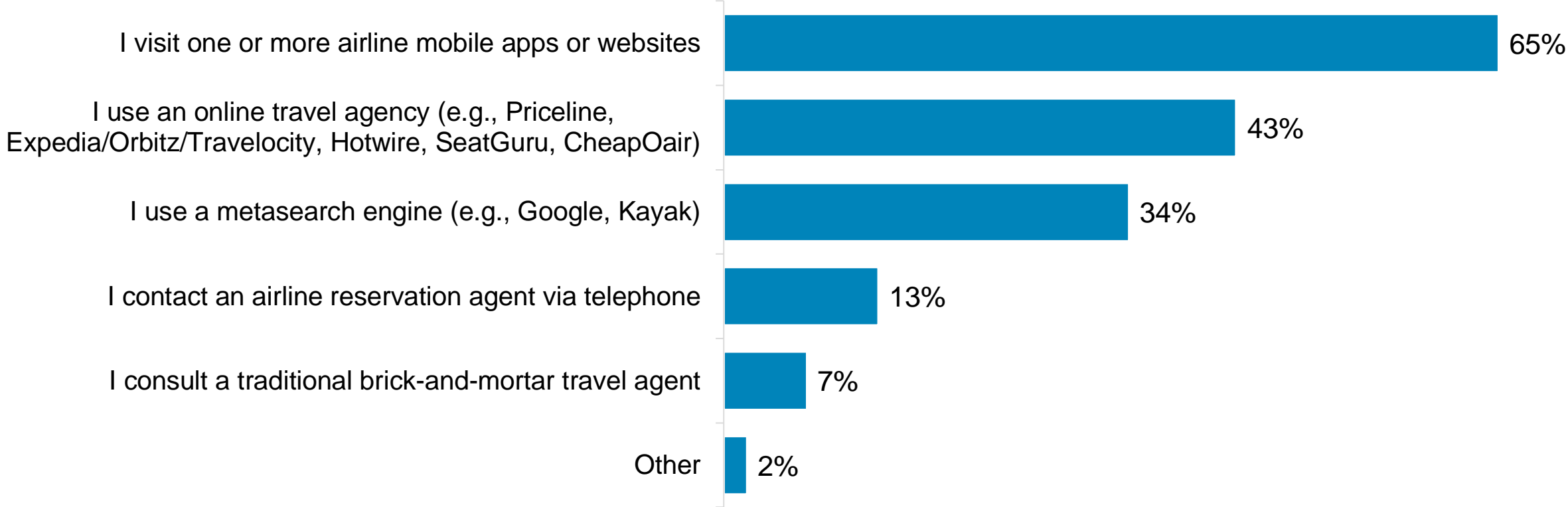
% of Respondents Indicating “Very Important” or “Somewhat Important”



Source: Ipsos survey of American adults (February 2022)

Of Those Flying for Personal Reasons, Two-Thirds 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)

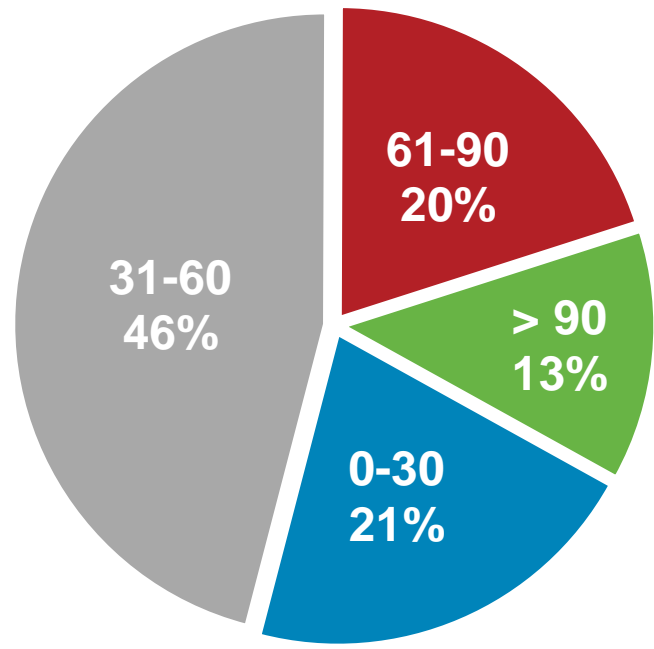
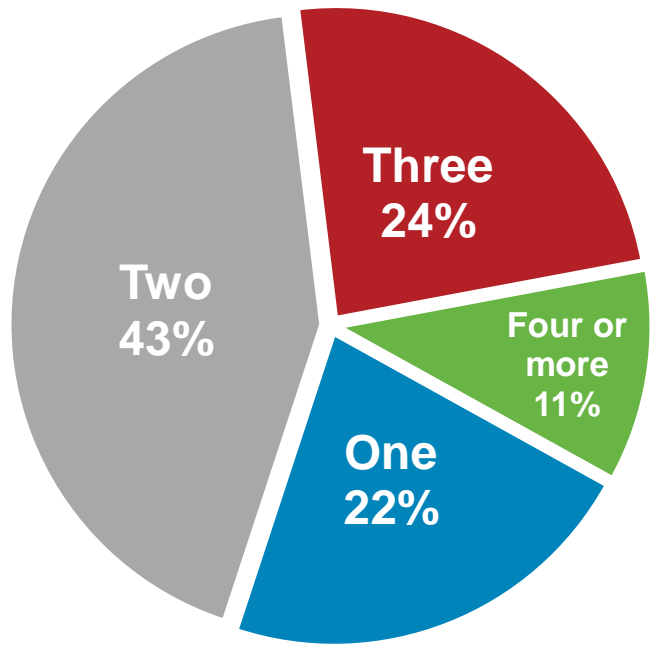


Source: Ipsos survey of American adults (February 2022)

When Traveling for Personal Reasons, Nearly 80% of Air Travel Consumers Consult More Than One Site/Agency/Company; Two-Thirds Spend an Hour or Less Researching Flight Options

When traveling for personal reasons, how many sites/agencies/companies do you typically visit/call when researching air travel options before making a final purchase?

How much time (in minutes) do you typically spend researching air travel options for personal travel before making a purchase?

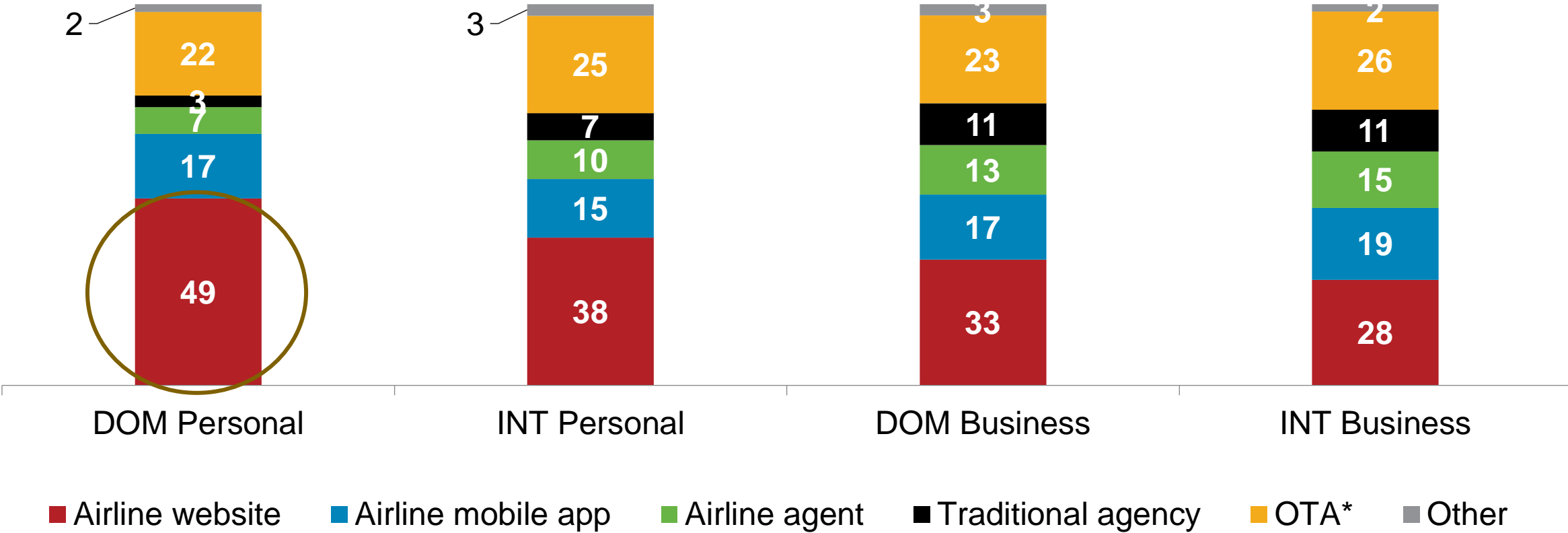


Source: Ipsos survey of American adults (February 2022)

About Half of Domestic Personal Flyers Book Flights Via Airline Websites

International Business Flyers Rely More Than Other Groups on Traditional Airline/Travel Agents

When flying, which resources do you typically use to book your flight?



Source: Ipsos survey of American adults (February 2022)

* Online travel agency

Only Half of Flyers Know That Advertised Prices *Includes* Government-Imposed Taxes/Fees

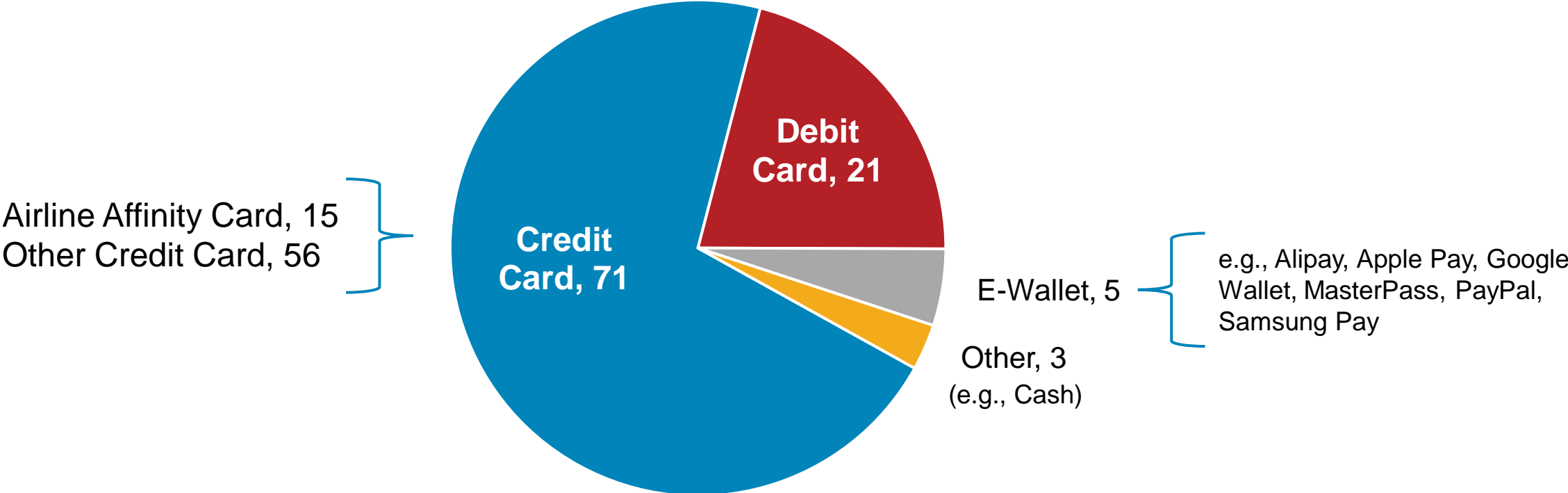
In the search results, when you see the advertised prices for each flight, which of the following statements do you think is correct?

| Statement | 2019 Flyers (N=4,064) | 2020 Flyers (N=1,955) | 2021 Flyers (N=3,687) |
|--|----------------------------------|----------------------------------|----------------------------------|
| The advertised price includes government-imposed taxes and fees | 49% | 52% | 52 |
| The advertised price does not include government-imposed taxes and fees | 51% | 48% | 48 |

Source: A4A Air Travel Survey conducted by Ipsos

In 2021, 70% of Personal Travelers Typically Used a Credit Card to Purchase Airline Tickets

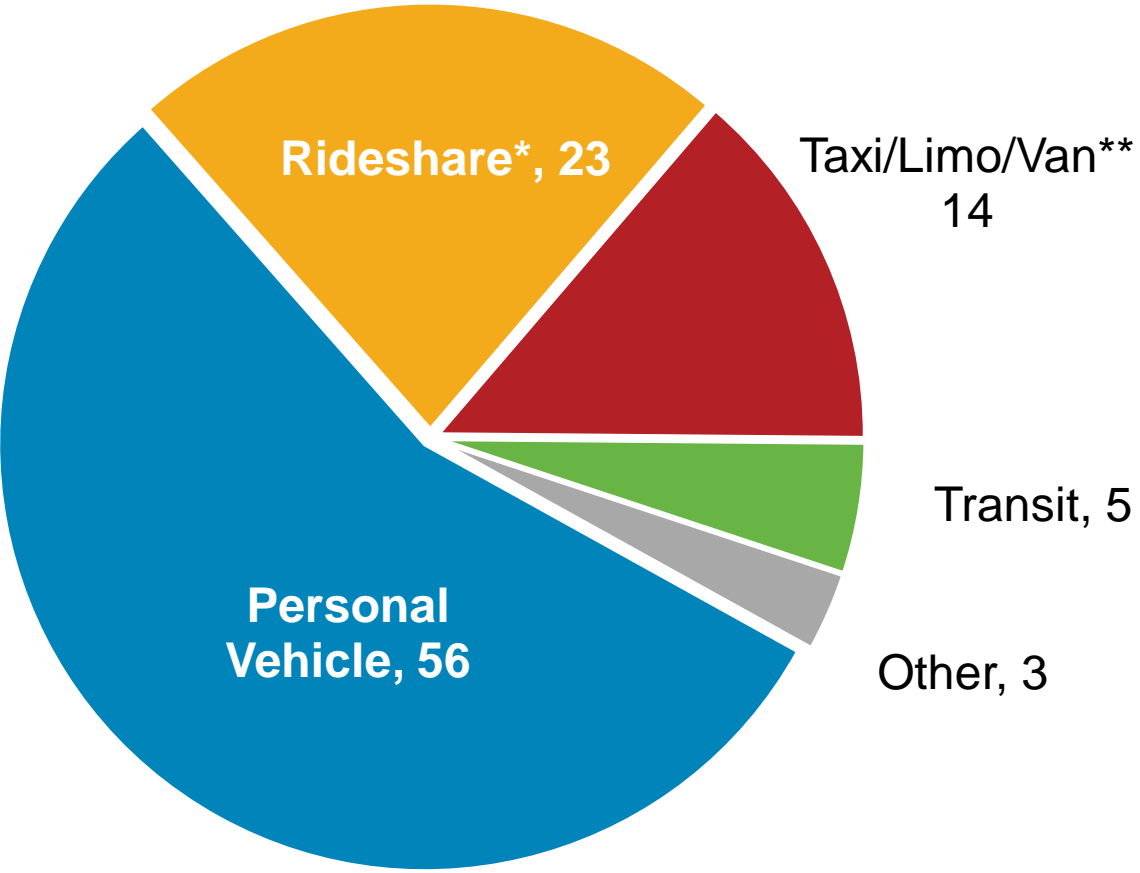
When traveling for personal reasons, what form of payment do you typically use?



Source: Ipsos survey of American adults (February 2022)

Nearly One in Four Air Travelers Typically Gets to the Airport via Ridesharing Service

What is your typical means of getting to the airport?



Source: Ipsos survey of American adults (February 2022)

* Lyft, Uber, Via, etc. ** Includes airport shuttle, hotel shuttle, etc.

Flyers Are Increasingly Using Mobile Devices to Check in for Flights

Among Those Not Checking Bags, 80% Checked in Electronically (App/Kiosk/Website)

How did you most commonly check in for trips?

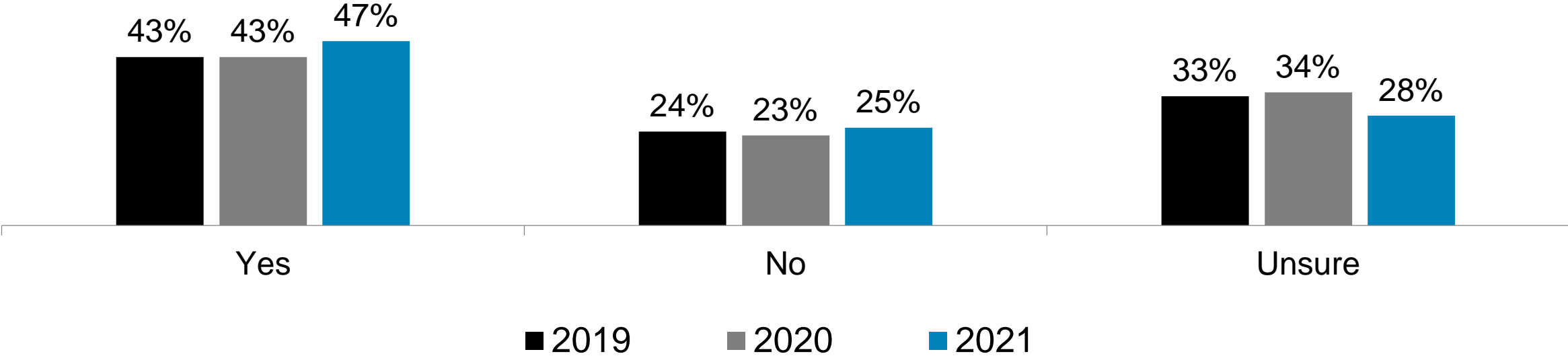
| 2021 Flyers | Checking a Bag | | Not Checking a Bag | |
|--|----------------|-----------|--------------------|-----------|
| | 2019 % | 2021 % | 2019 % | 2021 % |
| Mobile device/app | 17 | 24 | 29 | 40 |
| Automated kiosk at the airport | 24 | 22 | 25 | 20 |
| Airline website | 15 | 15 | 23 | 20 |
| Airport ticket counter | 34 | 30 | 18 | 16 |
| Airport skycap (curbside) | 8 | 7 | 4 | 4 |
| Other | 2 | 2 | 1 | 1 |
| Electronic (sum of first three) | 56 | 61 | 77 | 80 |

Source: A4A Air Travel Survey conducted by Ipsos

47% of Americans Would Opt for Biometrics to Ensure a Speedier Domestic Journey

25% Say No and 28% Are Unsure

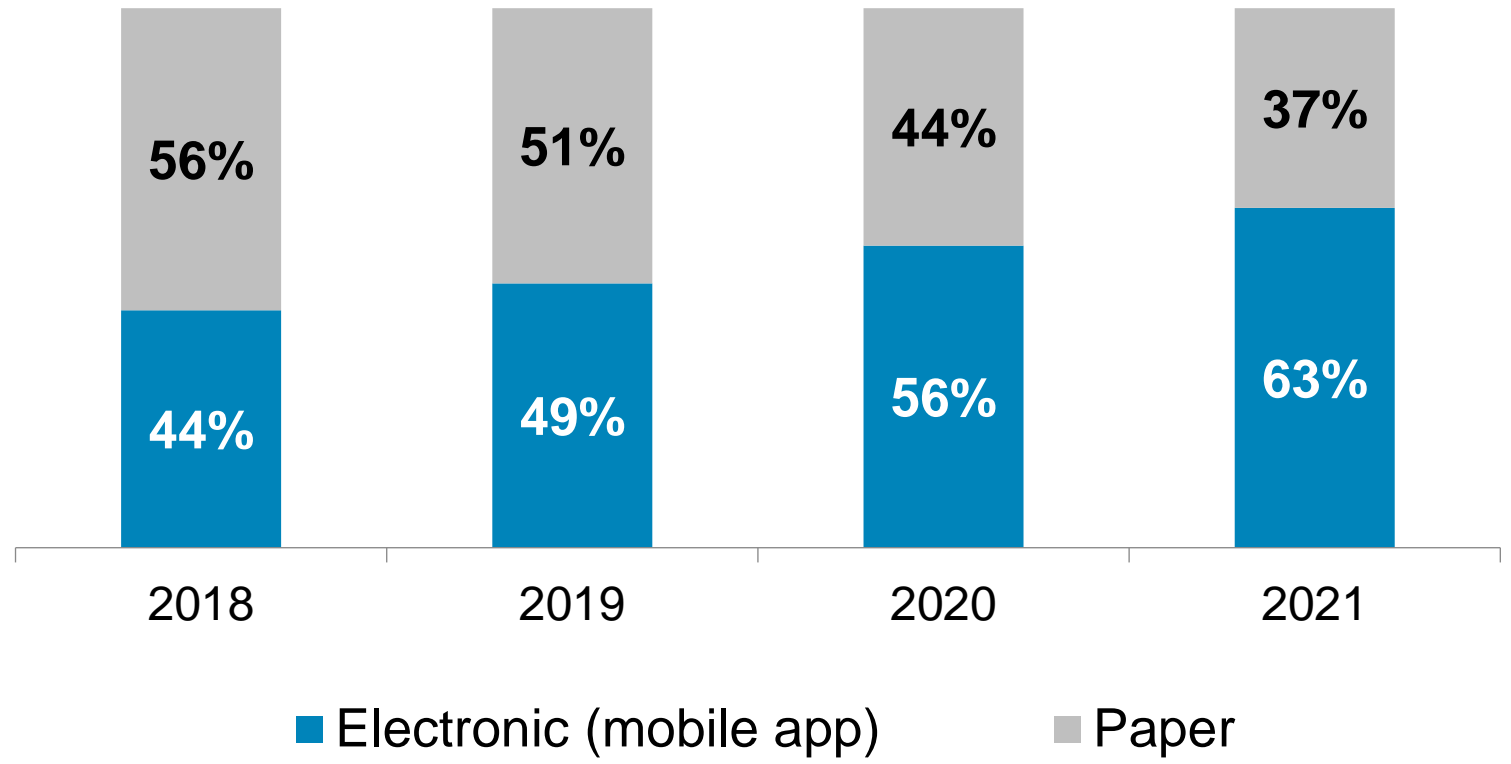
If biometric facial recognition also were available for domestic flights and resulted in a speedier journey (e.g., checking in, going through security, boarding the aircraft), would you prefer that over using a traditional boarding pass and identity document (e.g., passport, driver's license)?



Source: Ipsos survey of American adults (January 2020-February 2022)

Flyers Are Increasingly Comfortable Using Their Mobile Devices to Board the Aircraft

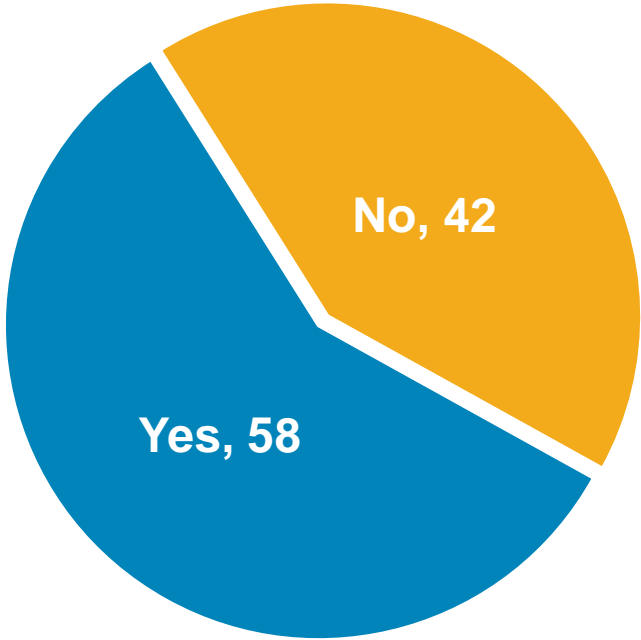
At the gate, which type of boarding pass do you typically use?



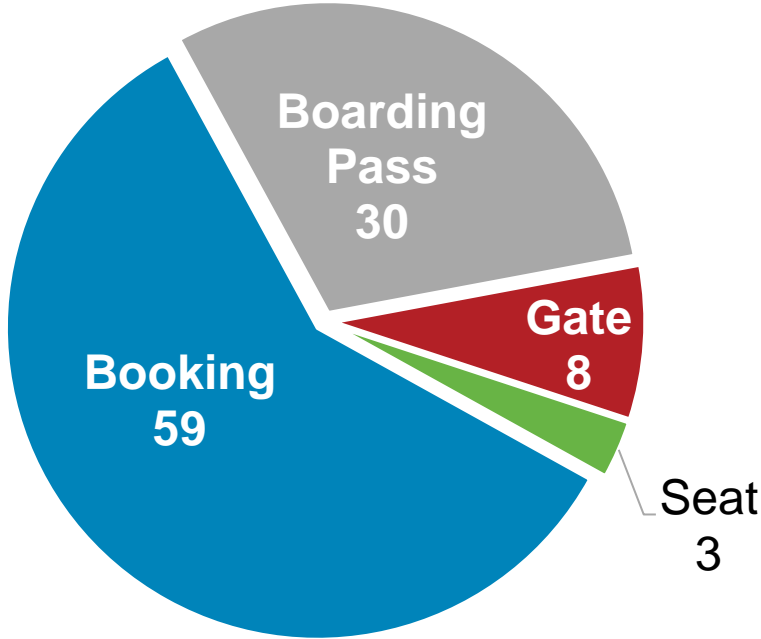
Source: A4A Air Travel Survey conducted by Ipsos

About 60% of Air Travelers Know What Aircraft They're Flying, and 60% of Those Become Aware of the Aircraft Type When Booking the Flight

When you travel by air, do you typically know what type of aircraft you're flying on?



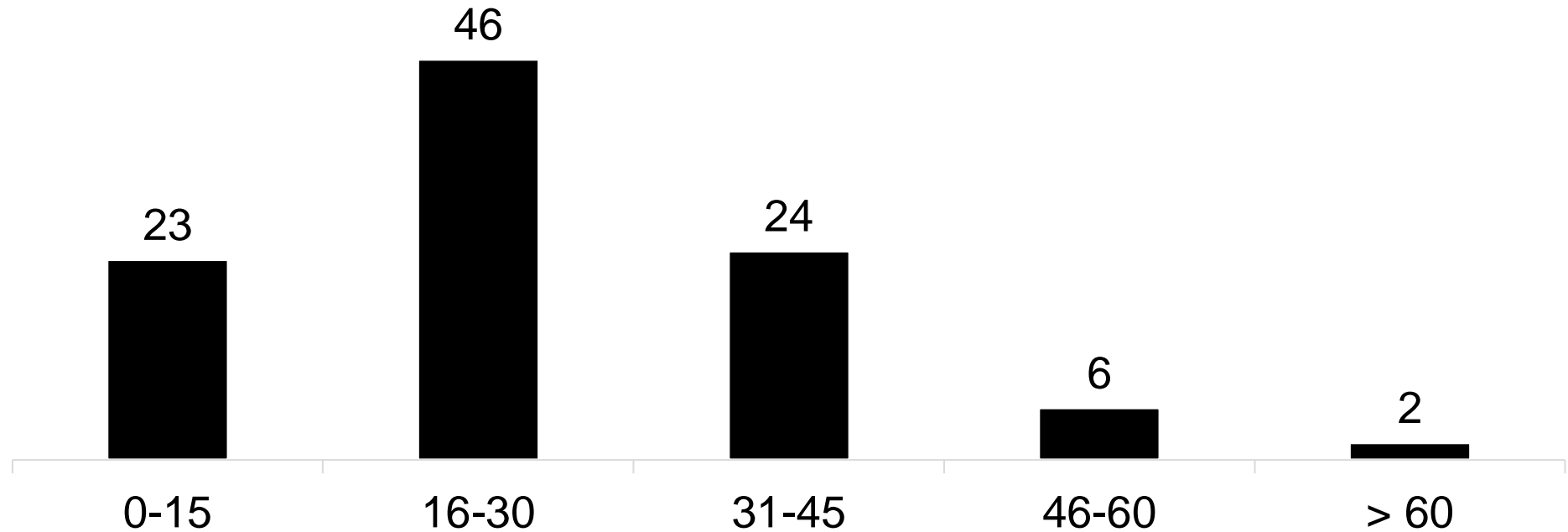
At what point in your journey do you typically first become aware of the type of aircraft involved?



Source: Ipsos survey of American adults (February 2022)

~70% of International Air Travelers Expect a U.S. Customs/Immigration Wait Under 30 Minutes

Once you've entered the queue for U.S. Customs/Immigration upon returning to the United States, what do you think (in minutes) is a reasonable wait time?

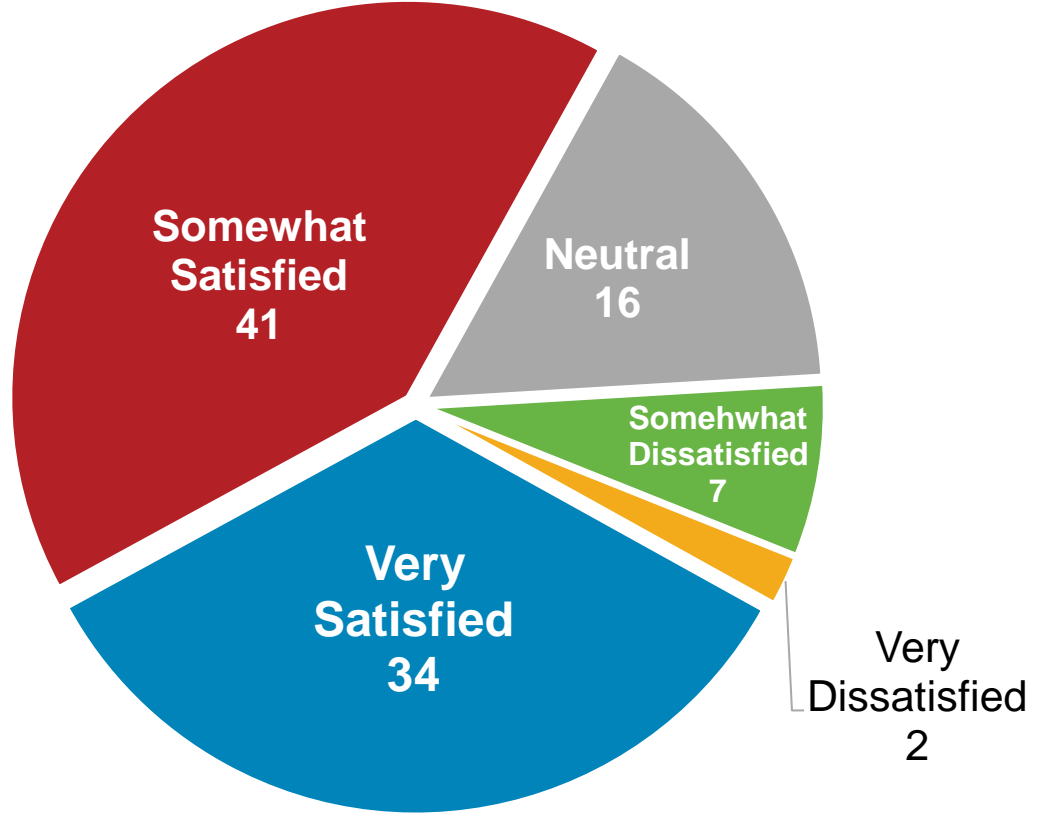


Source: Ipsos survey of American adults (February 2022)

75% of 2021 Flyers Reported Being Very or Somewhat Satisfied With Their Overall Experience

Only 2% Reported Being Very Dissatisfied

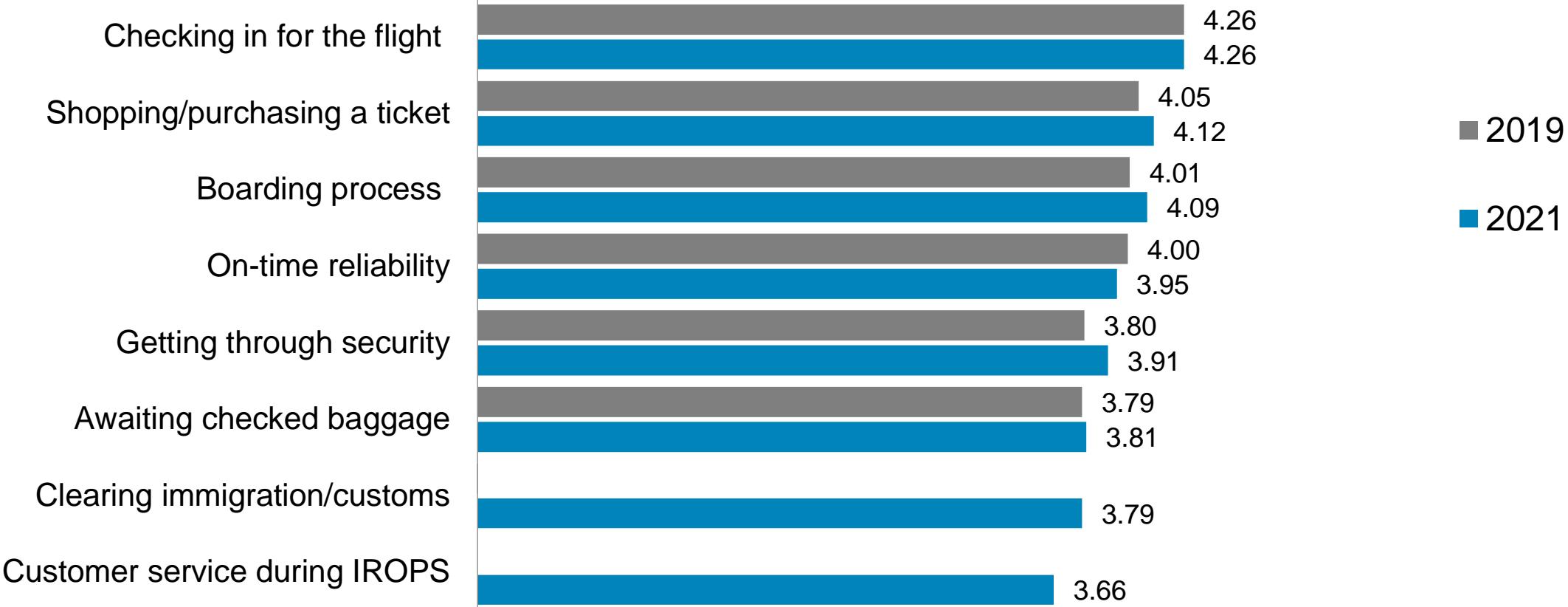
Thinking about your overall experience with air travel in 2021, how satisfied or dissatisfied are you?



Source: Ipsos survey of American adults (February 2022)

Flyers Consistently Give Highest Marks to Check-In and Shopping/Purchasing Experience

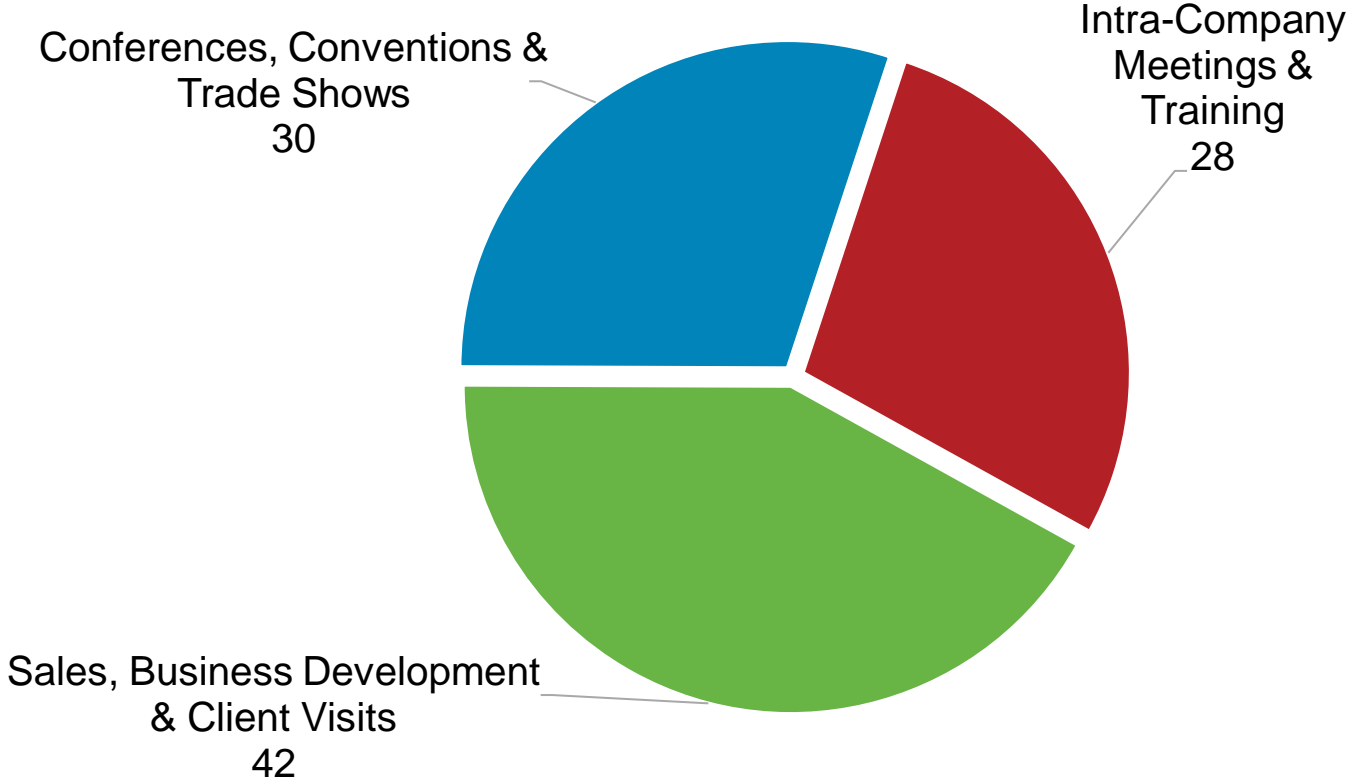
On a scale of 1 (very dissatisfied) to 5 (very satisfied), how would you rate your overall satisfaction with:



Source: A4A Air Travel Survey conducted by Ipsos

About 70% of Business Trips Are Taken to Generate or Maintain Clients / Revenue

In a normal year (pre-pandemic), approximately how many airline trips did you take for each of the following business purposes?

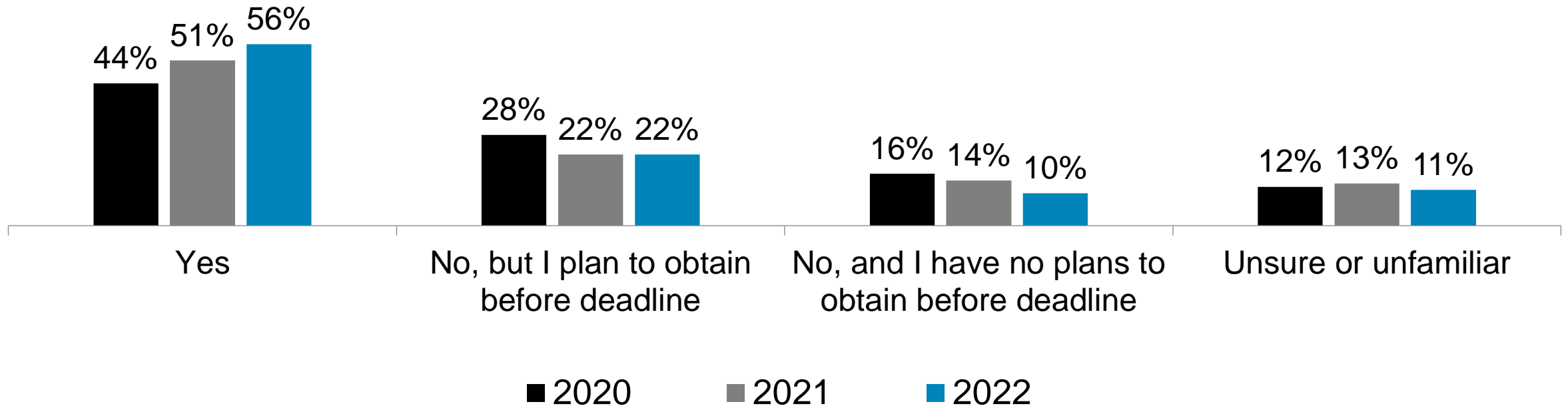


Source: Ipsos survey of American adults (February 2022)

56% of Americans Report Being REAL ID-Compliant as of February 2022

An Additional 22% Intend to Be Compliant by May 2023

Effective May 2023, the only state-issued driver's license or ID that will be valid as identification for TSA will be a "REAL ID" license. A valid passport and other selected federal forms of identity will also still be accepted as proof of identity in order to board commercial aircraft. Is your driver's license or other state-issued ID a REAL ID?

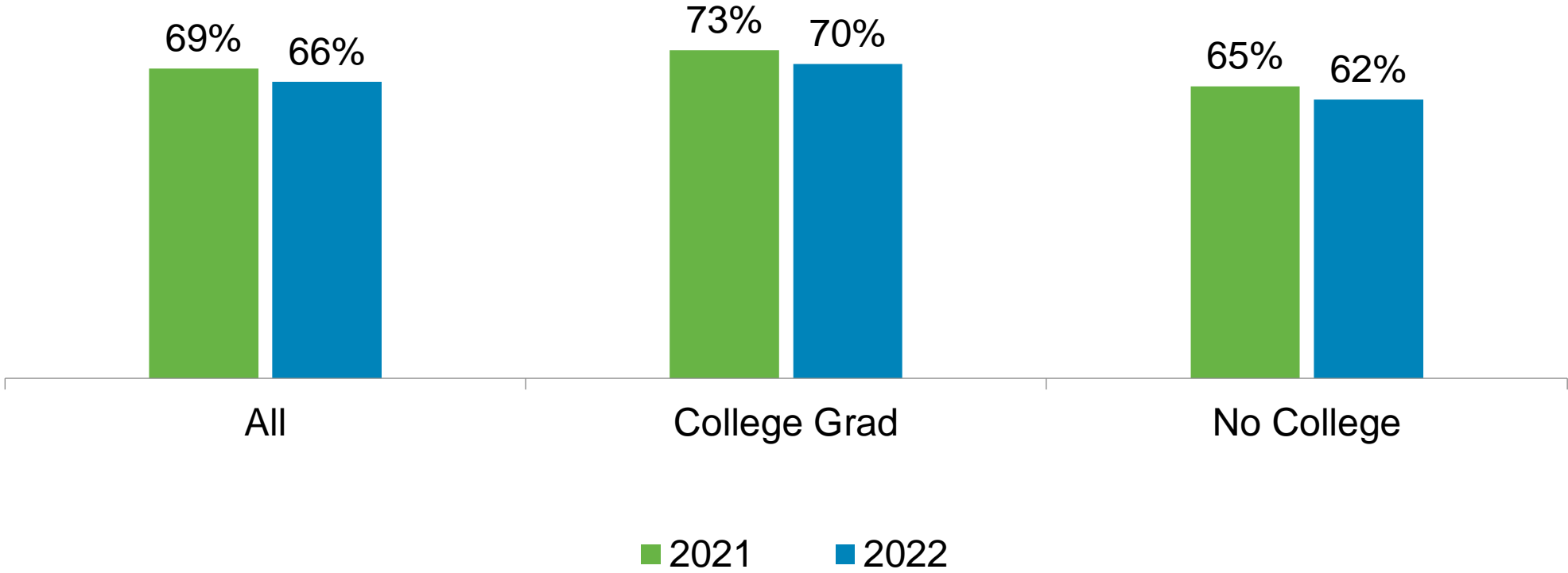


Source: Ipsos survey of American adults (January 2020-February 2022)

Two-Thirds of Population Values Airline Commitments to Environmentally Friendly Operations

College Grads Are More Likely to Value Environmental Commitments

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, recycling, reducing waste)?

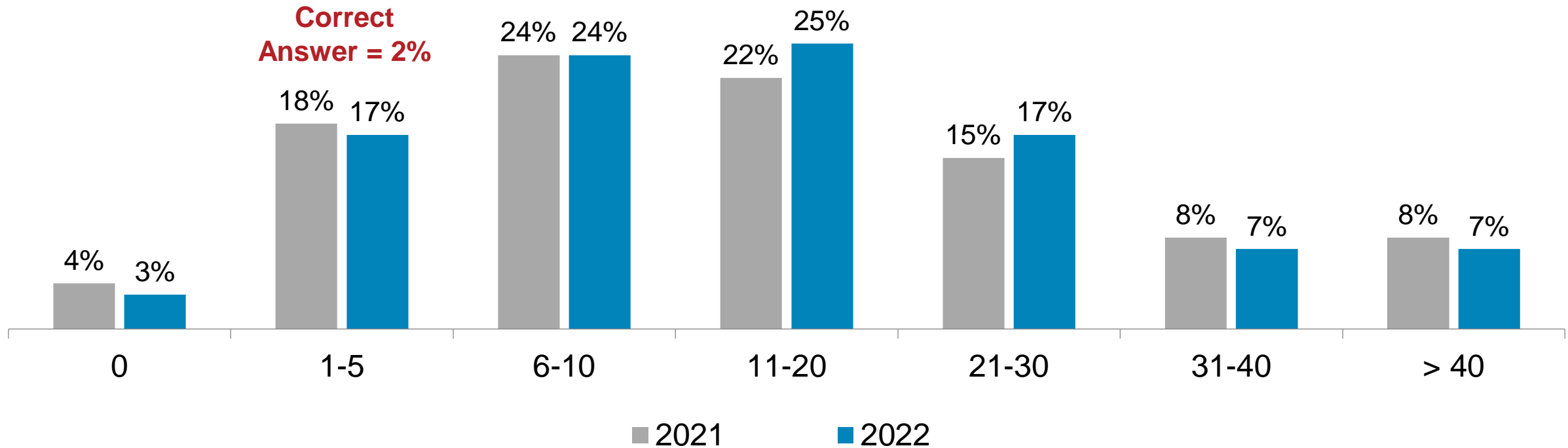


Source: Ipsos survey of American adults (January 2021 and February 2022)

Over Half of Americans Think Airlines Are Responsible for > 10 Percent of U.S. GHG Emissions

Per EPA, U.S. Airlines Account for Less Than 2% of the Nation's GHG Emissions

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



Source: Ipsos survey of American adults (January 2021 and January 2022)



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