Air Travelers in America
Key Findings of a Survey Conducted by Ipsos

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These are some of the findings of an Ipsos poll conducted between January 9-31, 2023, on behalf of Airlines for America® (A4A). This poll screened a national sample of 11,215 adults (age 18 or older) to identify those who have “ever flown on an airplane,” combining samples from the probability-based KnowledgePanel® and a non-probability sample. Of these, 5,140 respondents qualified for and completed the survey, with 2,078 respondents coming from the KnowledgePanel and 3,062 coming from the non-probability sample.

This survey was partially conducted using the Ipsos KnowledgePanel, the most well-established online probability-based panel that is representative of the adult U.S. population. Panelists are recruited into this invitation-only panel via postal mailings to a random selection of residential addresses. To ensure that non-internet households are included, Ipsos provides an internet-enabled tablet to those who need them. Additional sample was obtained using a non-probability sample with a quota design to increase the overall study sample size and allow for analyses of subpopulation groups of interest.

The study was conducted in English. The data were weighted to adjust for age, race/ethnicity, education, Census region by metropolitan status, and household income. The demographic benchmarks for adults ages 18 and older in the United States came from the 2022 March Supplement of the Current Population Survey (CPS).
As Air Travel Has Become Safer and More Accessible, More Americans Have Taken to the Skies
Almost Nine in Ten Americans Have Flown Commercially

Share (Percent) of U.S. Adult Population That Flew...

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

Airlines for America
We Connect the World
More Than Half of Americans Aged 18-24 Flew in 2022

94% of Americans Aged 55+ Have Flown in Their Lifetimes

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

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
More Than Half of Americans Report Having Flown Before Their 16th Birthday
Nearly Four Out of Five Have Flown Prior to Age 21

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

- 0-5: 19%
- 6-10: 17%
- 11-15: 15%
- 16-20: 28%
- 21+: 21%

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
Nearly 80% of Americans with household incomes under $50K have flown commercially. Those with a college degree are more likely to have flown than those without degrees.

### % Who Flew — By Household Income

<table>
<thead>
<tr>
<th></th>
<th>In 2018-2022</th>
<th>In Lifetime</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $50K</td>
<td>48</td>
<td>78</td>
</tr>
<tr>
<td>$50K+</td>
<td>74</td>
<td>96</td>
</tr>
</tbody>
</table>

### % Who Flew — By Level of Education

<table>
<thead>
<tr>
<th></th>
<th>In 2018-2022</th>
<th>In Lifetime</th>
</tr>
</thead>
<tbody>
<tr>
<td>No College Degree</td>
<td>59</td>
<td>82</td>
</tr>
<tr>
<td>College Degree</td>
<td>82</td>
<td>98</td>
</tr>
</tbody>
</table>

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
Over the Past Five Years, Many Americans Experienced a Low-Cost or Ultra-Low-Cost Carrier
12% of Americans Flew a Foreign-Flag Carrier on at Least One Personal Trip

In the past five years (2018-2022), when traveling for personal reasons, which of the following types of airlines* did you fly?

<table>
<thead>
<tr>
<th>Airline Group</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>American, Delta, United (U.S. global network airlines)</td>
<td>72</td>
</tr>
<tr>
<td>Alaska, Hawaiian, JetBlue, Southwest (U.S. low-cost or hybrid airlines)</td>
<td>46</td>
</tr>
<tr>
<td>Allegiant, Avelo, Breeze, Frontier, Spirit, Sun Country (U.S. ultra-low-cost airlines)</td>
<td>19</td>
</tr>
<tr>
<td>Silver Airways, Cape Air, or any other U.S. airline</td>
<td>1</td>
</tr>
<tr>
<td>Air Canada, Aeromexico, British Airways, JAL, or other non-U.S. airlines</td>
<td>12</td>
</tr>
</tbody>
</table>

* Check all that apply

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
In 2022, Among Americans, Three Out of Four Air Trips Were Taken for Personal Reasons

Approximate Personal* Share (Percent) of Trips

<table>
<thead>
<tr>
<th>Year</th>
<th>Business (DOM)</th>
<th>Personal (INT)</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1977-97</td>
<td>18%</td>
<td>6%</td>
<td>24%</td>
</tr>
<tr>
<td>2015-19</td>
<td>56%</td>
<td>21%</td>
<td>76%</td>
</tr>
<tr>
<td>2022</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Totals may not add to 100 due to rounding

Source: A4A Air Travel Surveys 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.
Over One Fourth of Those With Flexible Work Arrangements Said That Flexibility Resulted in Their Taking More Leisure Trips in 2022

(Note: Asked only of those who indicated they had a flexible work arrangement)

*Did you take more trips in 2022 for leisure because you had a flexible work arrangement?*

- Yes: 28%
- No: 72%

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
Overall, When Choosing Which Flight to Take, Price Is the Dominant Consideration
Nearly Half of Those Who Flew in 2022 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?

<table>
<thead>
<tr>
<th>Criteria for Choosing Among Flights</th>
<th>Overall Rank</th>
<th>Mean Score</th>
<th>% of Respondents Ranking #1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ticket price/value</td>
<td>1</td>
<td>1.78</td>
<td>55</td>
</tr>
<tr>
<td>Nonstop flight option (vs. connecting)</td>
<td>2</td>
<td>2.39</td>
<td>23</td>
</tr>
<tr>
<td>Departure/arrival time</td>
<td>3</td>
<td>2.45</td>
<td>17</td>
</tr>
<tr>
<td>Percentage of seats that are occupied (fullness)</td>
<td>4</td>
<td>4.62</td>
<td>2</td>
</tr>
<tr>
<td>Availability/quality of inflight WiFi/entertainment</td>
<td>5</td>
<td>4.82</td>
<td>1</td>
</tr>
<tr>
<td>Availability/quality of food/beverage service</td>
<td>6</td>
<td>4.92</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
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”

- **Low prices**: 93% Very, 23% Somewhat
- **More comfortable seats**: 84% Very, 32% Somewhat
- **Better schedules**: 80% Very, 38% Somewhat
- **More room for carry-ons**: 63% Very, 37% Somewhat
- **Better WiFi**: 45% Very, 28% Somewhat

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
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)

- I visit one or more airline mobile apps or websites: 70%
- I use an online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair): 38%
- I use a metasearch engine (e.g., Google, Kayak): 38%
- I contact an airline reservation agent via telephone: 8%
- I consult a traditional brick-and-mortar travel agent: 4%
- Other: 3%

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
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?

- Two: 40%
- One: 21%
- Three: 26%
- Four or more: 13%

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

- 0-30: 22%
- 31-60: 42%
- 61-90: 19%
- > 90: 17%

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
Basic Economy/Unbundled Tickets Are Popular and Consumers Are Well Informed

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)

At any point in 2022, in exchange for a lower fare, did you purchase a ticket where seat selection and/or baggage (checked and/or carry-on) cost extra?

- Yes 53%
- No 47%

Were you fully at the time of purchase that those items would cost “extra.”

- Yes 84%
- No 16%

Would you consider purchasing such a ticket again?

- Yes 74%
- Don't Know 17%
- No 9%
Less Than Half of Flyers Know That Advertised Prices *Include* Government-Imposed Charges

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

<table>
<thead>
<tr>
<th>Understanding of Search Results</th>
<th>2019 Flyers</th>
<th>2020 Flyers</th>
<th>2021 Flyers</th>
<th>2022 Flyers</th>
</tr>
</thead>
<tbody>
<tr>
<td>The advertised price <strong>includes</strong> government-imposed taxes and fees</td>
<td>49%</td>
<td>52%</td>
<td>52%</td>
<td>44%</td>
</tr>
<tr>
<td>The advertised price <strong>does not include</strong> government-imposed taxes and fees</td>
<td>51%</td>
<td>48%</td>
<td>48%</td>
<td>56%</td>
</tr>
</tbody>
</table>

Source: A4A Air Travel Survey conducted by Ipsos
More Than 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: A4A Air Travel Survey conducted by Ipsos (January 2023)
In 2022, 80% 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?

Credit Card: 84%
Debit Card: 14%
Cash: 2%

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
One in Five Air Travelers Typically Uses a Ridesharing Service to Get to the Airport

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

- Rideshare*, 20
- Taxi/Limo/Van**, 11
- Transit, 6
- Other, 4
- Personal Vehicle, 60

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)

* Lyft, Uber, Via, etc. ** Includes airport shuttle, hotel shuttle, etc.
Flyers Are Increasingly Using Mobile Devices to Check in for Flights
In 2022, Among Those Not Checking Bags, 83% Checked in Electronically

How did you most commonly check in for trips?

<table>
<thead>
<tr>
<th>Typical Means of Checking In</th>
<th>Checking a Bag</th>
<th>Not Checking a Bag</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile device/app</td>
<td>17% (2019)</td>
<td>22% (2022)</td>
</tr>
<tr>
<td>Automated kiosk at the airport</td>
<td>24% (2019)</td>
<td>28% (2022)</td>
</tr>
<tr>
<td>Airline website</td>
<td>15% (2019)</td>
<td>11% (2022)</td>
</tr>
<tr>
<td>Airport ticket counter</td>
<td>34% (2019)</td>
<td>31% (2022)</td>
</tr>
<tr>
<td>Airport skycap (curbside)</td>
<td>8% (2019)</td>
<td>5% (2022)</td>
</tr>
<tr>
<td>Other</td>
<td>2% (2019)</td>
<td>3% (2022)</td>
</tr>
<tr>
<td>Electronic (sum of first three)</td>
<td>56% (2019)</td>
<td>61% (2022)</td>
</tr>
</tbody>
</table>

Checking a Bag: 2019 % 2022 %
2019: 56%
2022: 61%

Not Checking a Bag: 2019 % 2022 %
2019: 77%
2022: 83%

Source: A4A Air Travel Survey conducted by Ipsos

Note: Totals may not add to 100 due to rounding
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) and a touchless experience, would you prefer that to using a traditional boarding pass and identity document (e.g., passport, driver’s license)?

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
More Than 60% of Flyers Use Their Mobile Devices to Board the Aircraft

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Electronic (mobile app)</th>
<th>Paper</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>2019</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>2020</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td>2021</td>
<td>63%</td>
<td>37%</td>
</tr>
<tr>
<td>2022</td>
<td>62%</td>
<td>37%</td>
</tr>
</tbody>
</table>

Source: A4A Air Travel Survey conducted by Ipsos

Note: Totals may not add to 100 due to rounding
85% 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 is a reasonable wait time (in minutes)?

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
71% of 2022 Flyers Reported Being Very or Somewhat Satisfied With Their Overall Experience
Only 4% Reported Being Very Dissatisfied

Thinking about your overall experience with air travel in 2022, how satisfied or dissatisfied are you?

- **Very Satisfied**: 26%
- **Somewhat Satisfied**: 45%
- **Neutral**: 16%
- **Somewhat Dissatisfied**: 8%
- **Very Dissatisfied**: 4%

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
Flyers Give Highest Marks to the Check-In Process
Tied for Second Place Are the Boarding Process and Ticket-Shopping/Purchasing Experience

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

- Checking in for the flight: 4.25
- Boarding process: 3.90
- Shopping/purchasing a ticket: 3.88
- Getting through security: 3.75
- Clearing immigration/customs: 3.75
- On-time reliability: 3.64
- Awaiting checked baggage: 3.58

Source: A4A Air Travel Survey conducted by Ipsos (January 2023)
59% of Travelers Value Airline Commitments to Environmentally Friendly Operations
Females, 25-39-Year-Olds, College Grads Value Environmental Commitments More Than Others

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 / paper usage)?

Source: Ipsos survey of American adults (January 2023)
Over Half of Travelers Think Airlines Account for More Than 10% 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

Note: Totals may not add to 100 due to rounding