



Airlines for America[®]

We Connect the World

Air Travelers in America

Key Findings of a Survey Conducted by Ipsos

March 2023

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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Ipsos Research Approach and Poll Accuracy

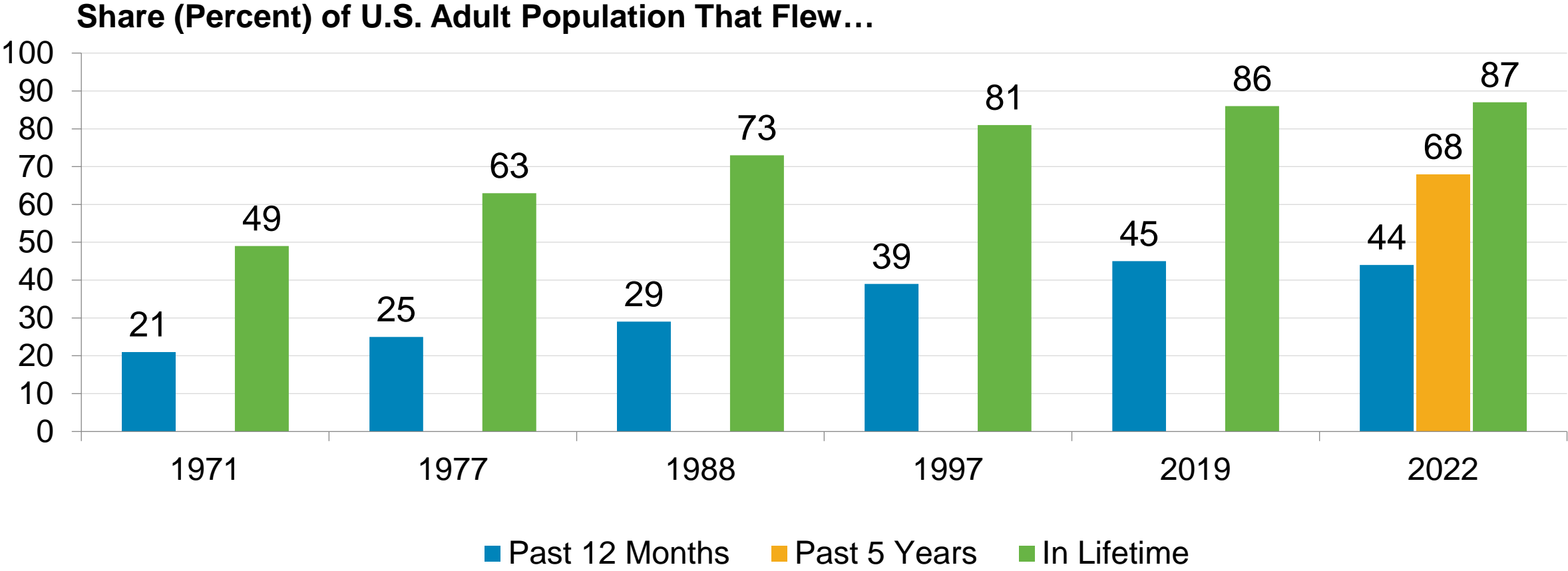
These are some of the findings of an Ipsos poll conducted between January 9-31, 2023, on behalf of Airlines for America® (A4A). This poll screened a national sample of 11,215 adults (age 18 or older) to identify those who have “ever flown on an airplane,” combining samples from the probability-based 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

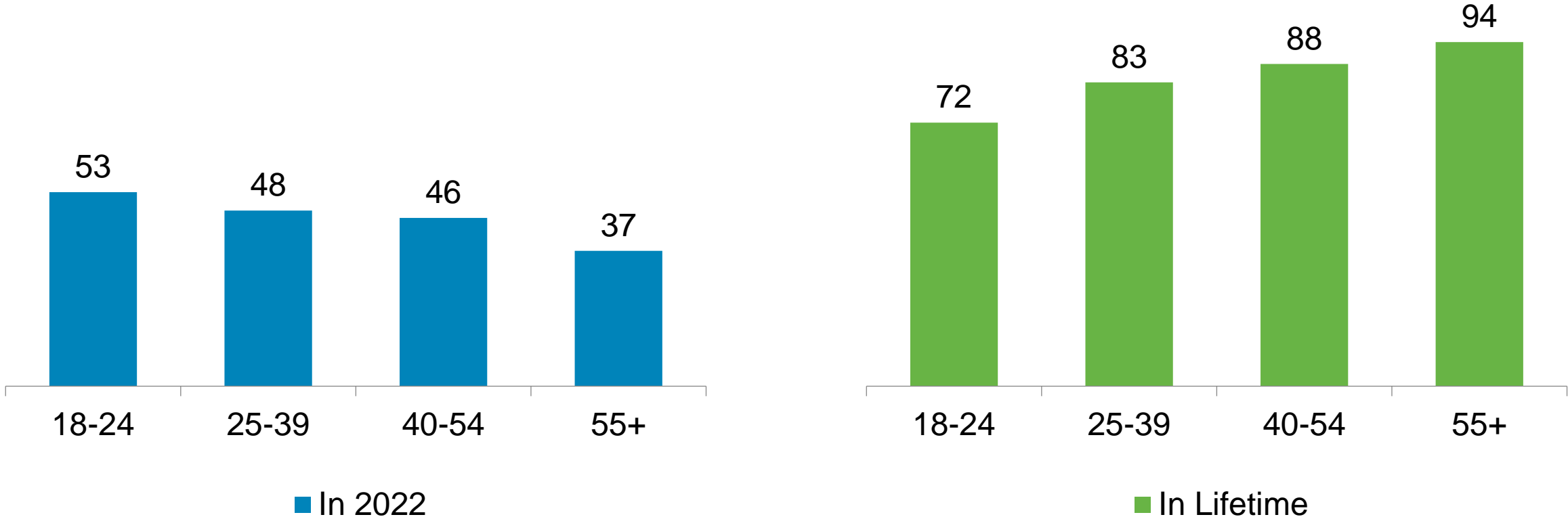


Sources: Historical A4A air travel surveys conducted by Gallup (1971 through 1997) and Ipsos

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

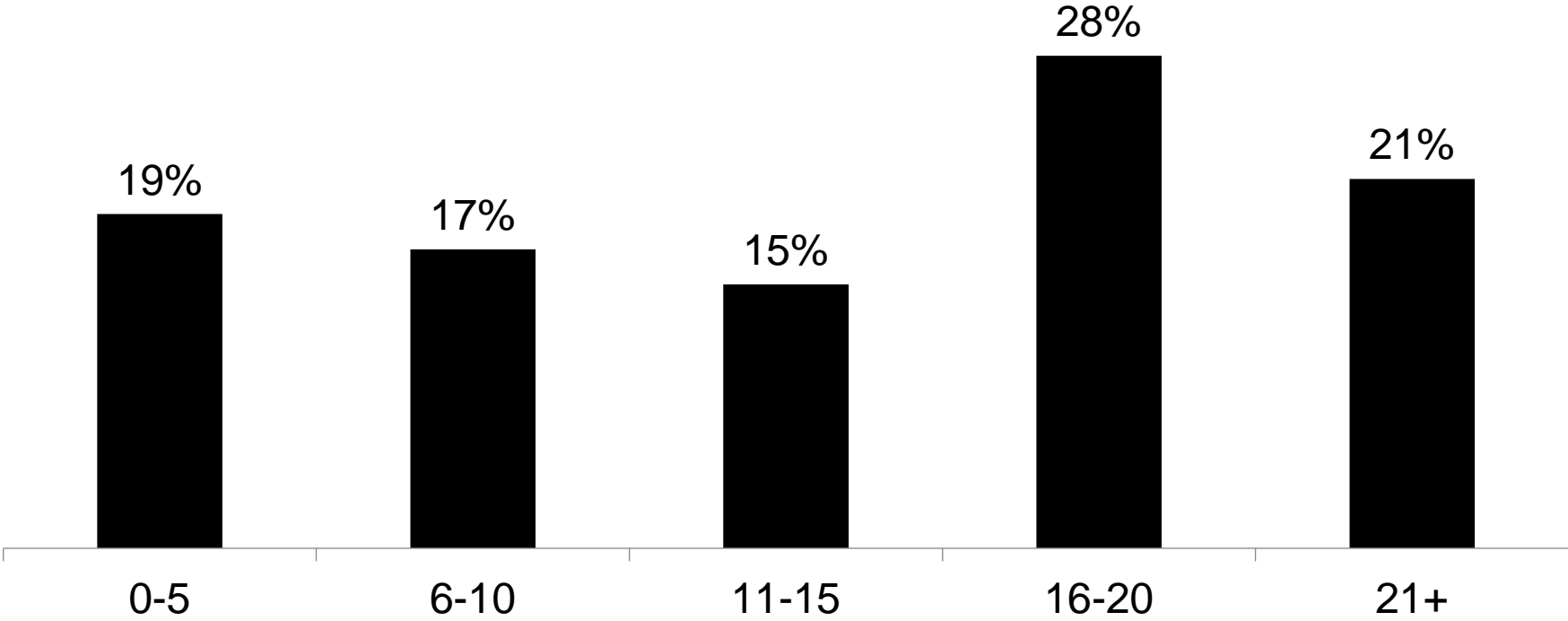


Source: A4A Air Travel Survey conducted by Ipsos (January 2023)

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?

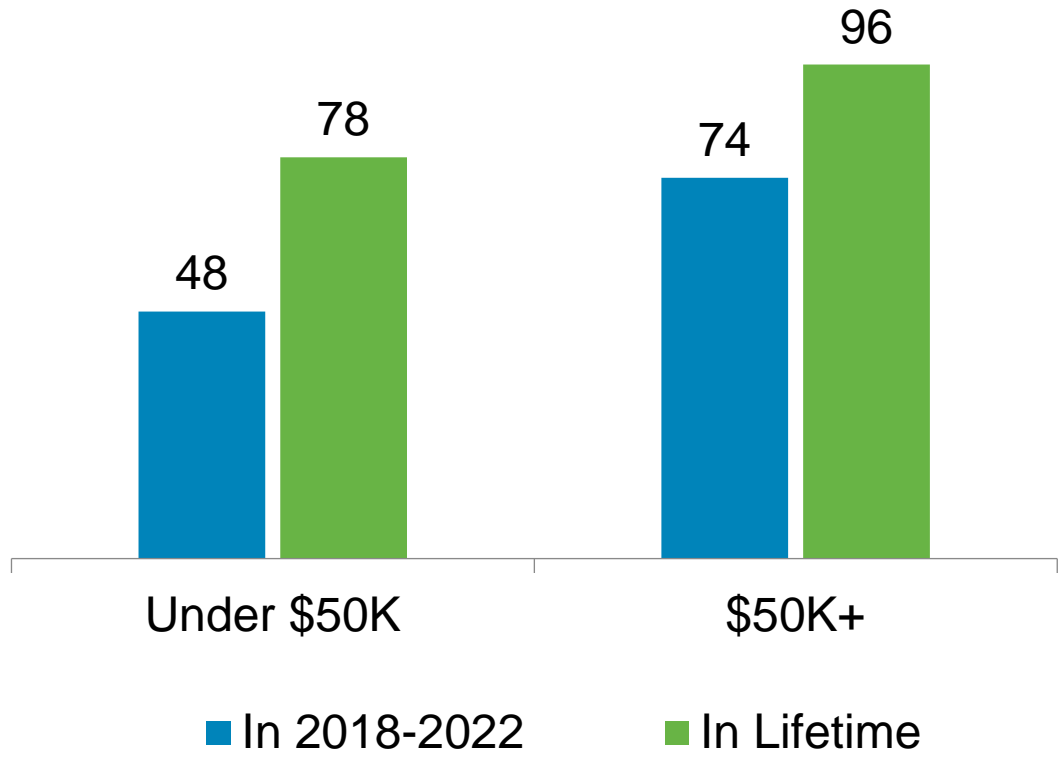


Source: A4A Air Travel Survey conducted by Ipsos (January 2023)

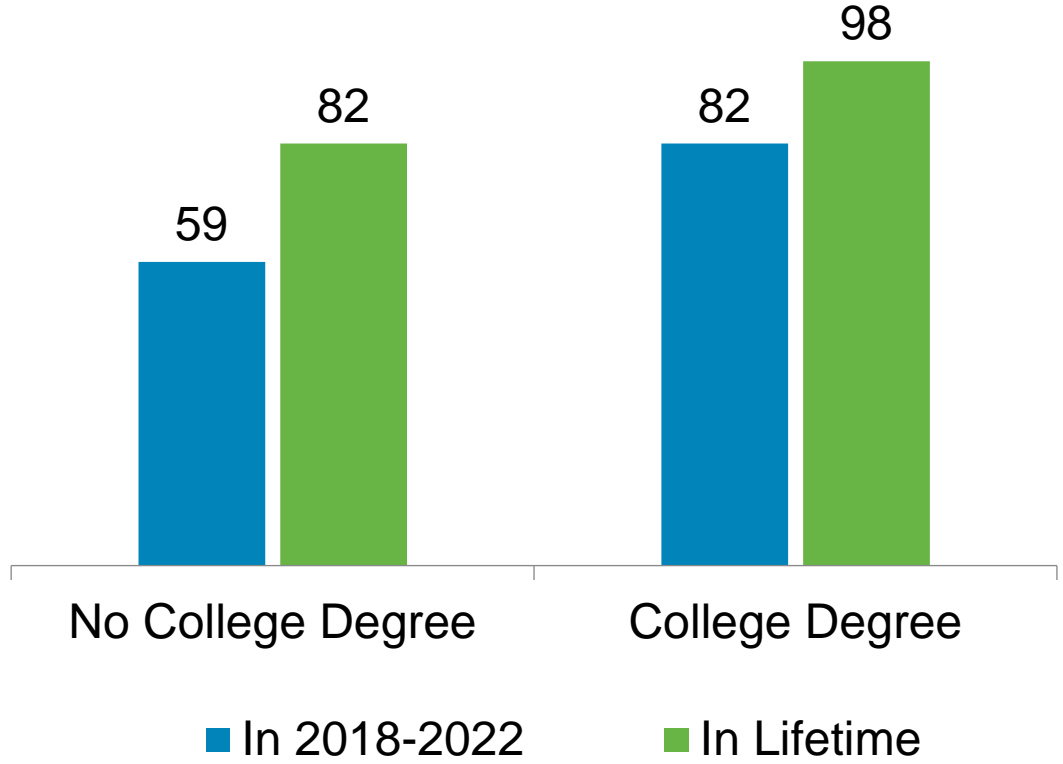
Nearly 80% of Americans With Household Incomes Under \$50K Have Flown Commercially

Those With a College Degree Are More Likely to Have Flown Than Those Without Degrees

% Who Flew — By Household Income



% Who Flew — By Level of Education



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?*

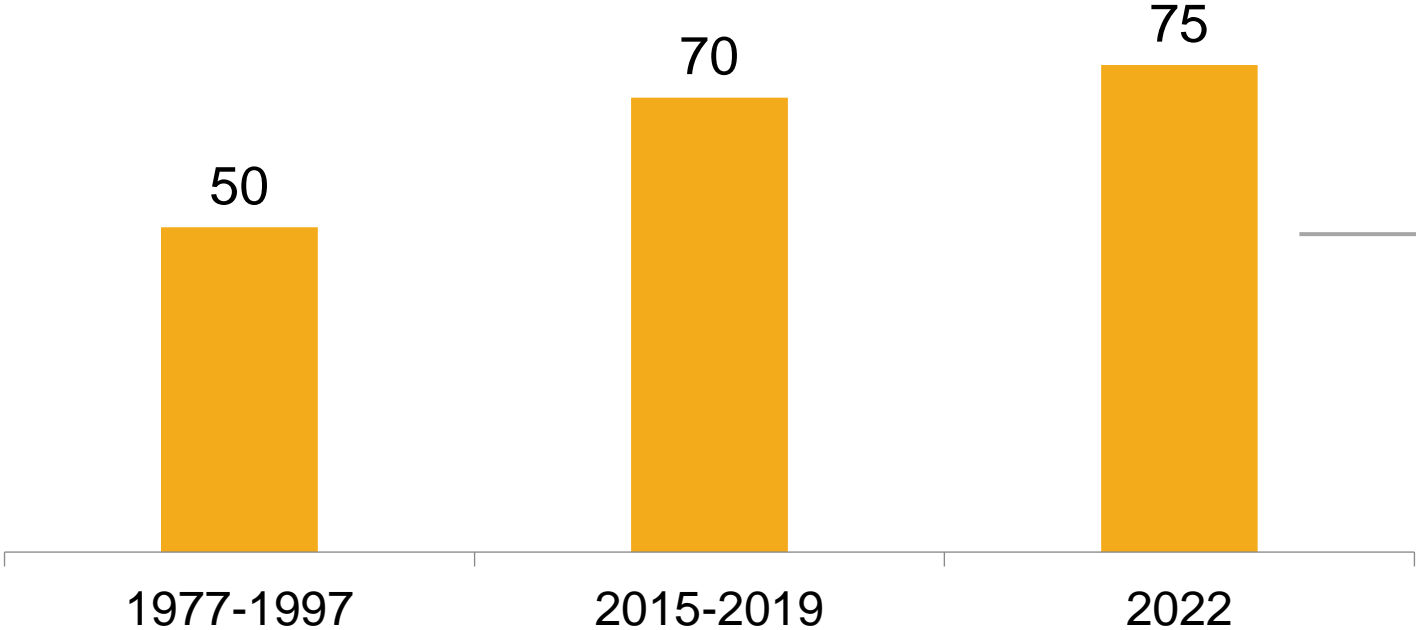
Airline Group	%
American, Delta, United (U.S. global network airlines)	72
Alaska, Hawaiian, JetBlue, Southwest (U.S. low-cost or hybrid airlines)	46
Allegiant, Avelo, Breeze, Frontier, Spirit, Sun Country (U.S. ultra-low-cost airlines)	19
Silver Airways, Cape Air, or any other U.S. airline	1
Air Canada,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

* 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



	Business	Personal
DOM	18%	56%
INT	6%	21%
Total	24%	76%

Note: Totals may not add to 100 due to rounding

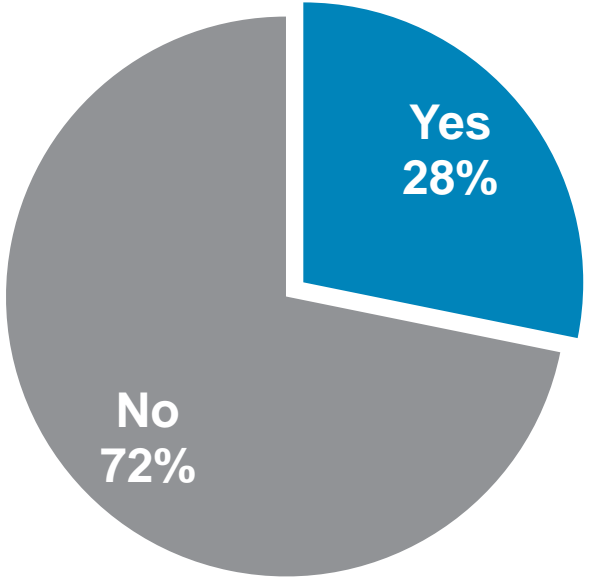
Source: A4A Air Travel Surveys conducted by Ipsos (2015-Present) and Gallup (1977-1997)

* 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?



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?

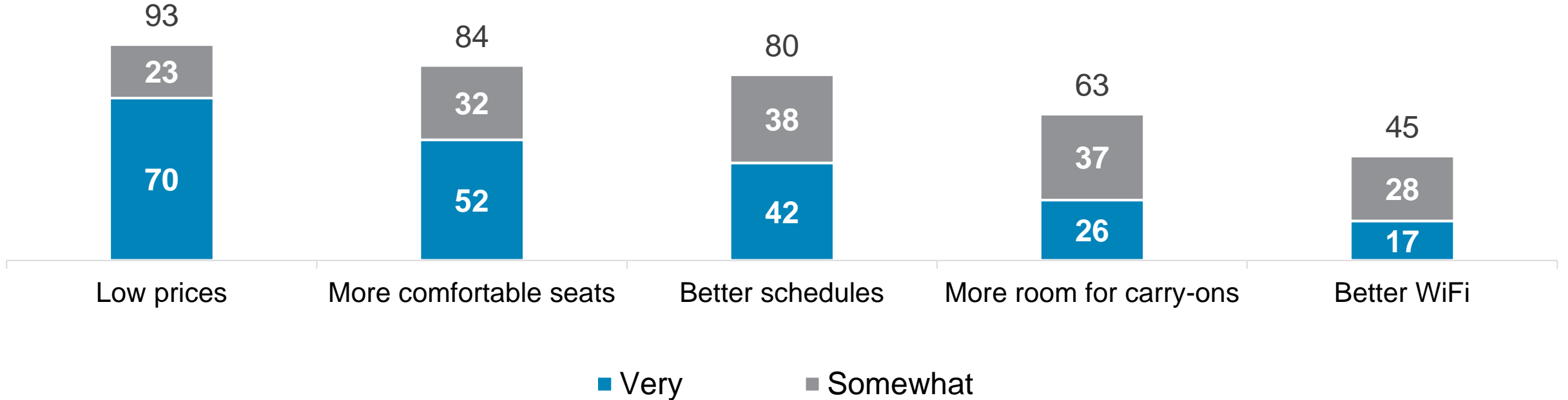
Criteria for Choosing Among Flights	Overall Rank	Mean Score	% of Respondents Ranking #1
Ticket price/value	1	1.78	55
Nonstop flight option (vs. connecting)	2	2.39	23
Departure/arrival time	3	2.45	17
Percentage of seats that are occupied (fullness)	4	4.62	2
Availability/quality of inflight WiFi/entertainment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

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?*

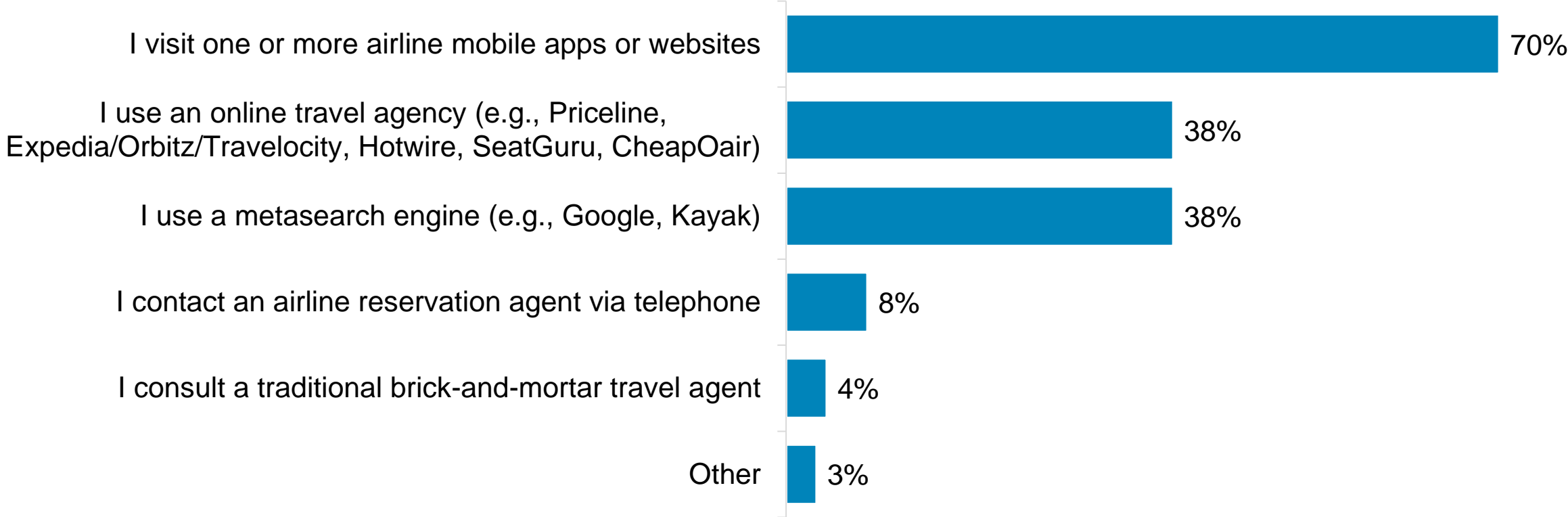
% of Respondents Indicating “Very Important” or “Somewhat Important”



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

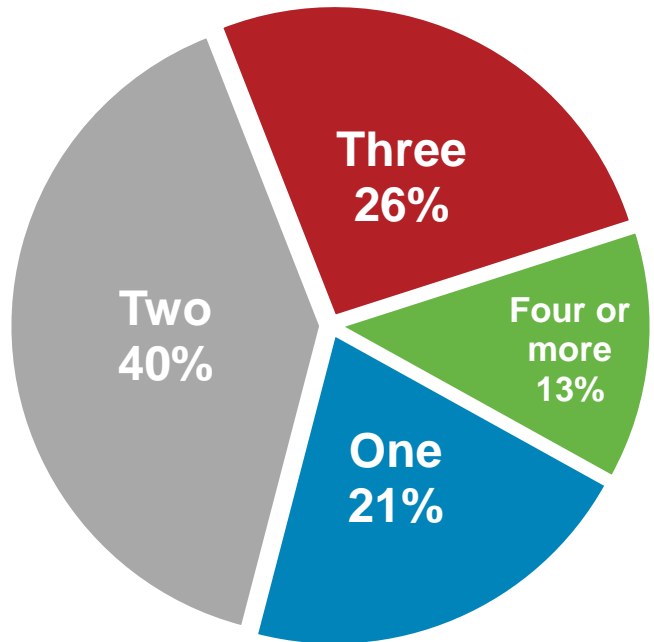
When traveling for personal reasons, which of the following options below do you generally consult when researching air travel options before making a final purchase? (select all applicable)



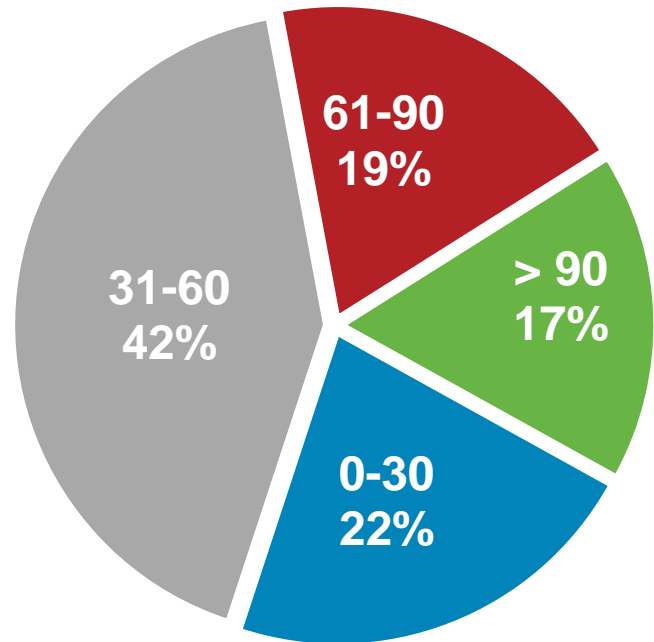
Source: A4A Air Travel Survey conducted by Ipsos (January 2023)

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?



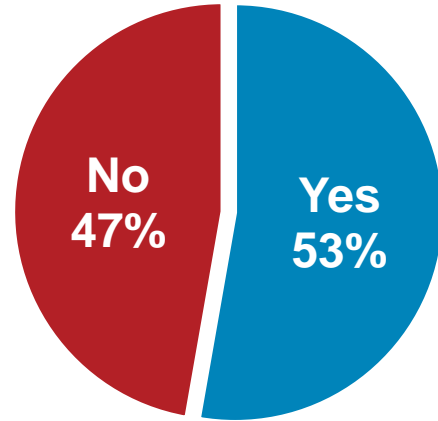
How much time (in minutes) do you typically spend researching air travel options for personal travel before making a purchase?



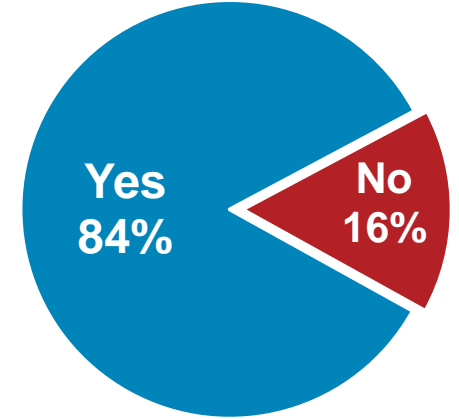
Source: A4A Air Travel Survey conducted by Ipsos (January 2023)

Basic Economy/Unbundled Tickets Are Popular and Consumers Are Well Informed

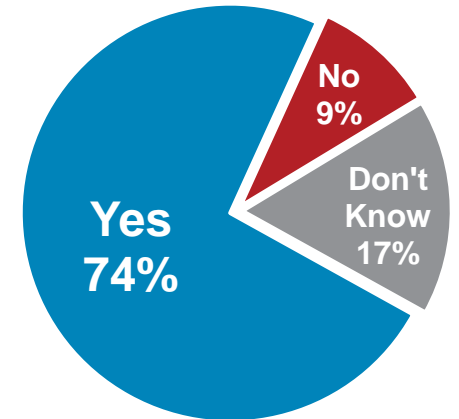
At any point in 2022, in exchange for a lower fare, did you purchase a ticket where seat selection and/or baggage (checked and/or carry-on) cost extra?



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



Would you consider purchasing such a ticket again?



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

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?

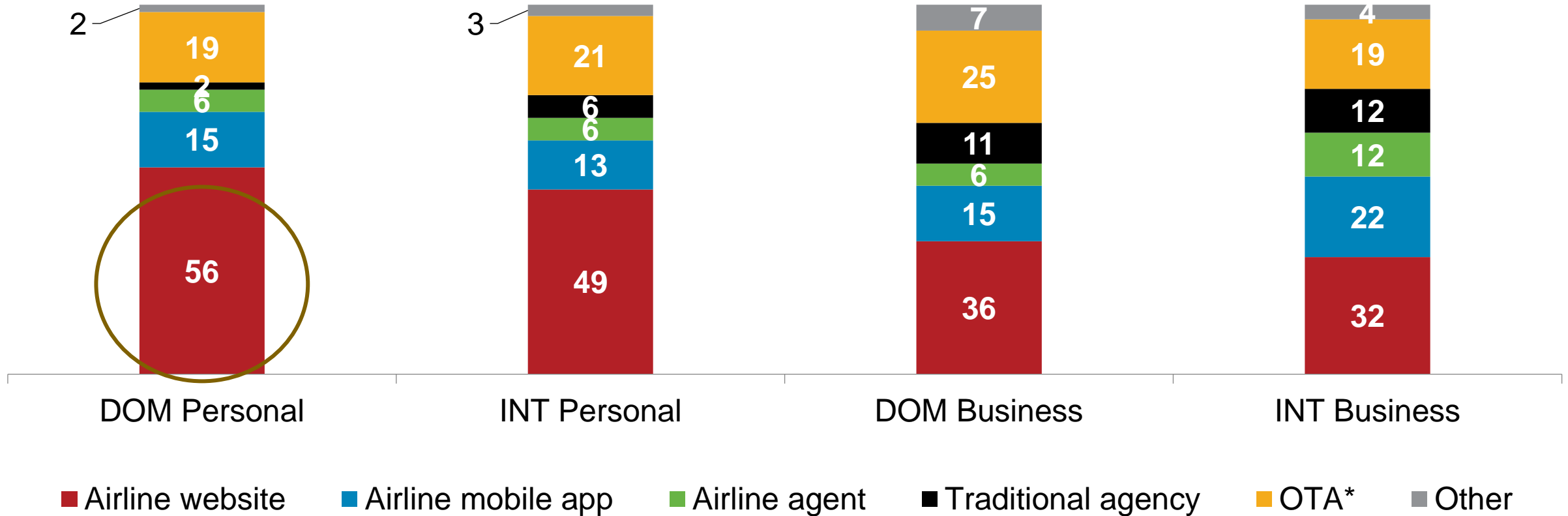
Understanding of Search Results	2019 Flyers	2020 Flyers	2021 Flyers	2022 Flyers
The advertised price includes government-imposed taxes and fees	49%	52%	52%	44%
The advertised price does not include government-imposed taxes and fees	51%	48%	48%	56%

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?

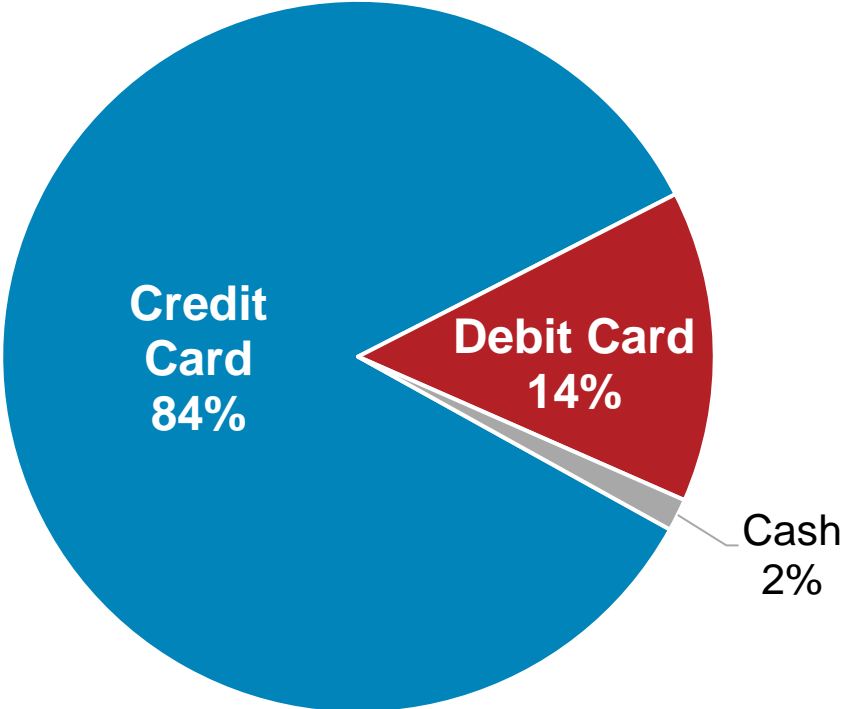


Source: A4A Air Travel Survey conducted by Ipsos (January 2023)

* Online travel agency

In 2022, 80% of Personal Travelers Typically Used a Credit Card to Purchase Airline Tickets

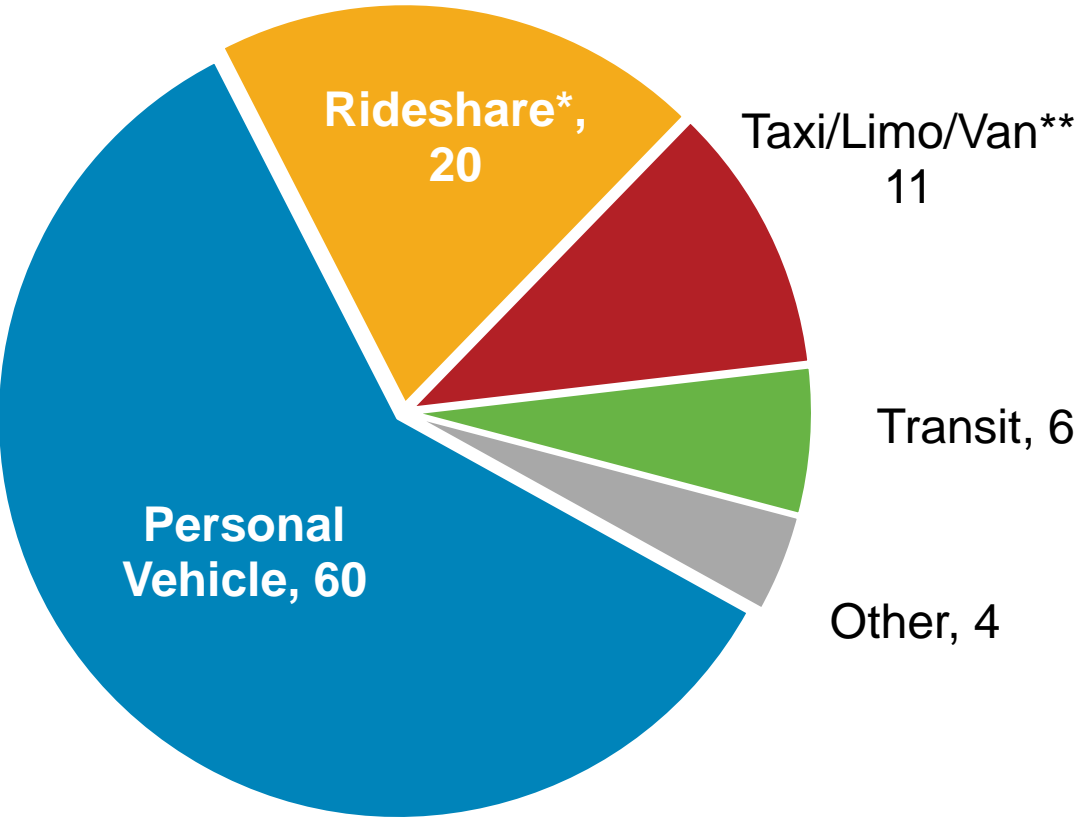
When traveling for personal reasons, what form of payment do you typically use?



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?



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?

Typical Means of Checking In	Checking a Bag		Not Checking a Bag	
	2019 %	2022 %	2019 %	2022 %
Mobile device/app	17	22	29	44
Automated kiosk at the airport	24	28	25	21
Airline website	15	11	23	18
Airport ticket counter	34	31	18	12
Airport skycap (curbside)	8	5	4	2
Other	2	3	1	2
Electronic (sum of first three)	56	61	77	83

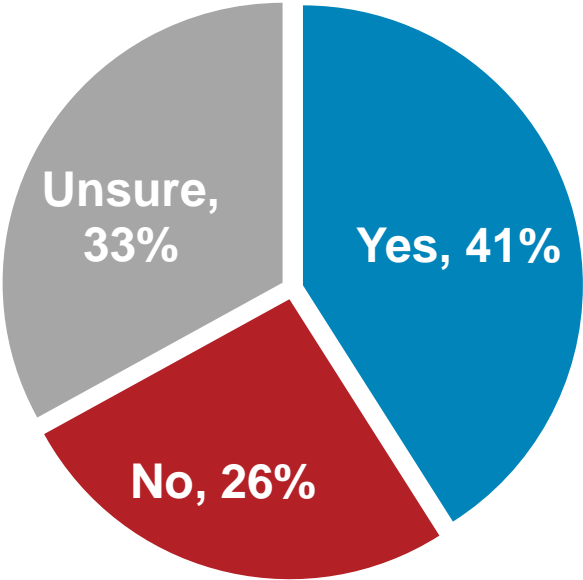
Source: A4A Air Travel Survey conducted by Ipsos

Note: Totals may not add to 100 due to rounding

41% of Americans Would Opt for Biometrics to Ensure a Speedier/Touchless Domestic Journey

26% Say No and 33% Are Unsure

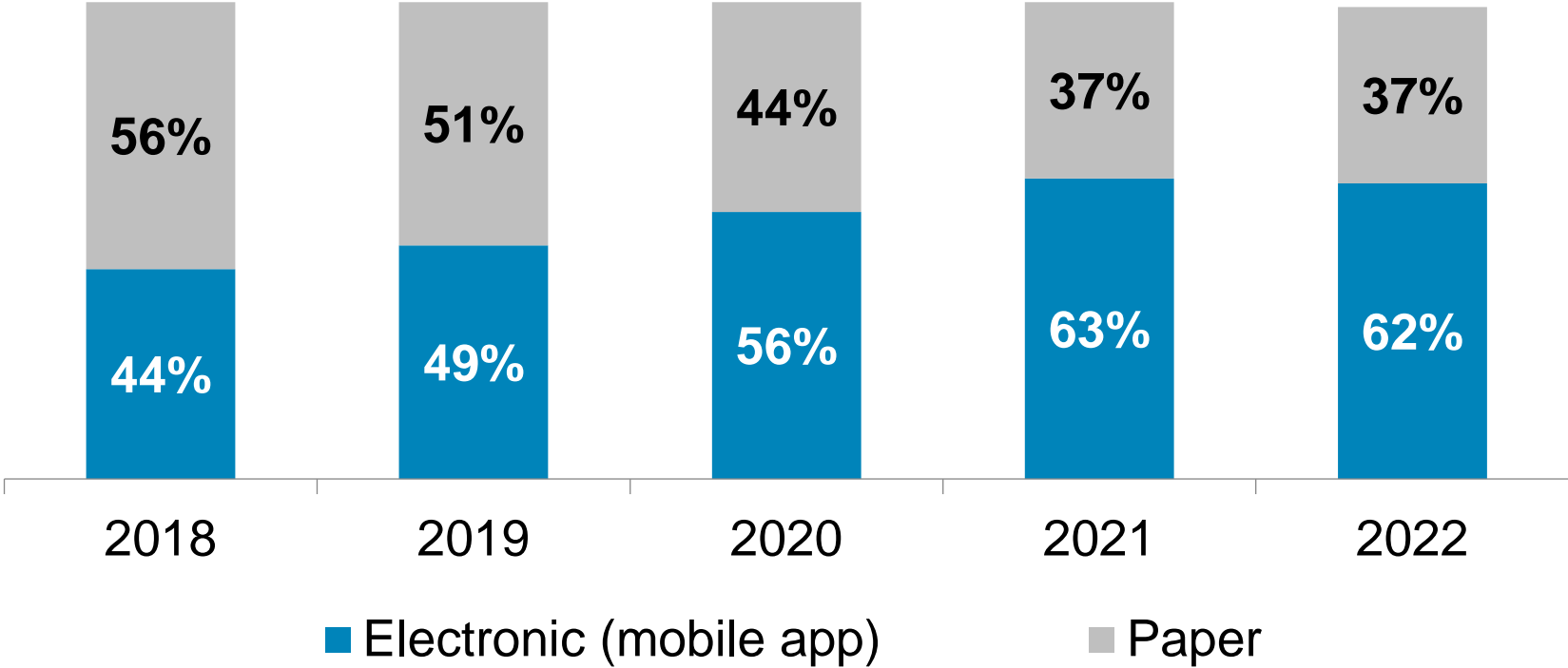
If biometric facial recognition also were available for domestic flights and resulted in a speedier journey (e.g., checking in, going through security, boarding the aircraft) and a touchless experience, would you prefer that to using a traditional boarding pass and identity document (e.g., passport,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

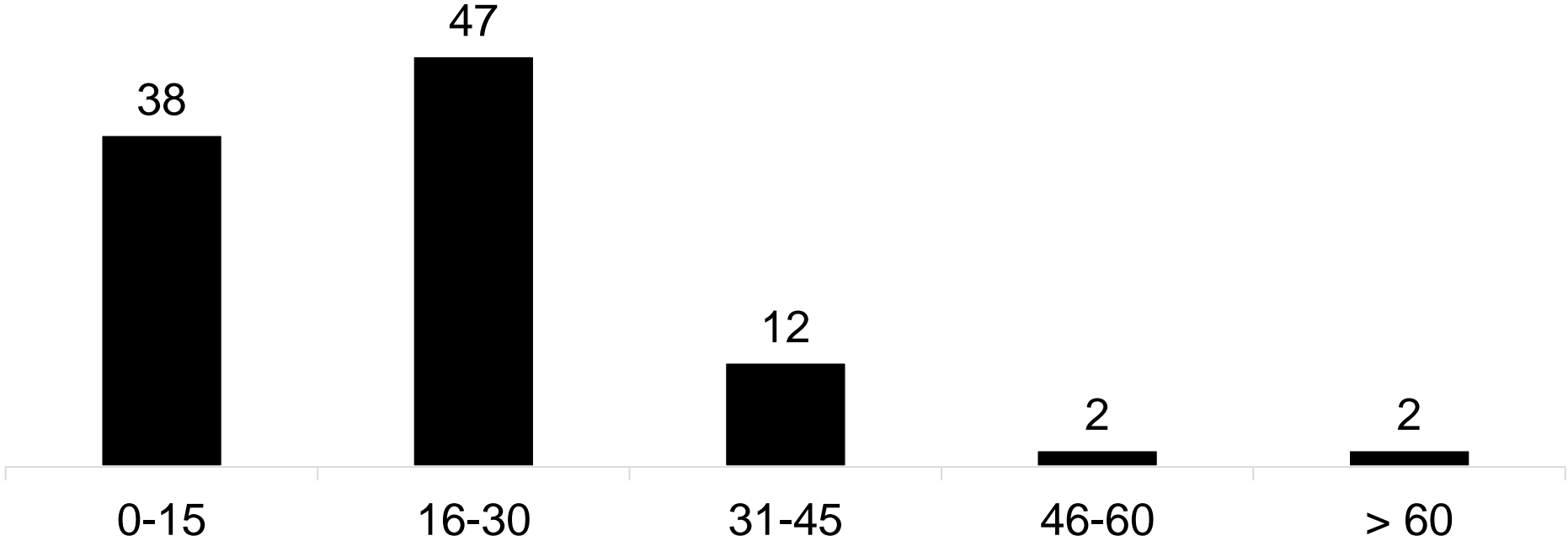


Source: A4A Air Travel Survey conducted by Ipsos

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)?

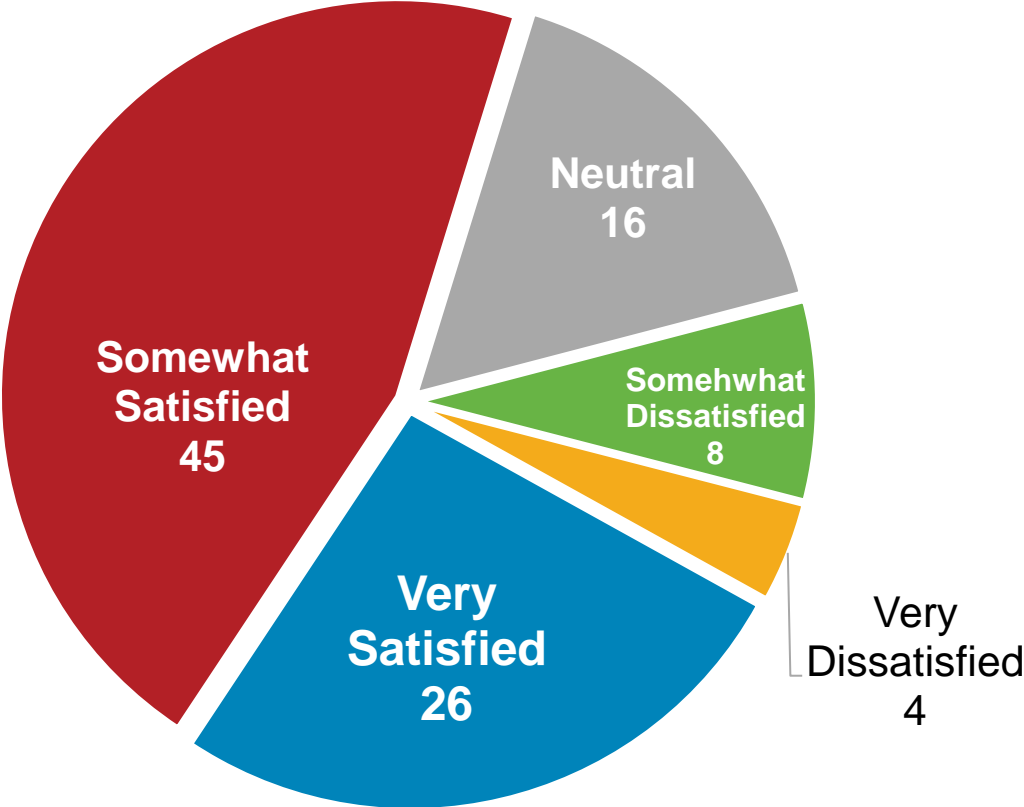


Source: A4A Air Travel Survey conducted by Ipsos (January 2023)

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?



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:

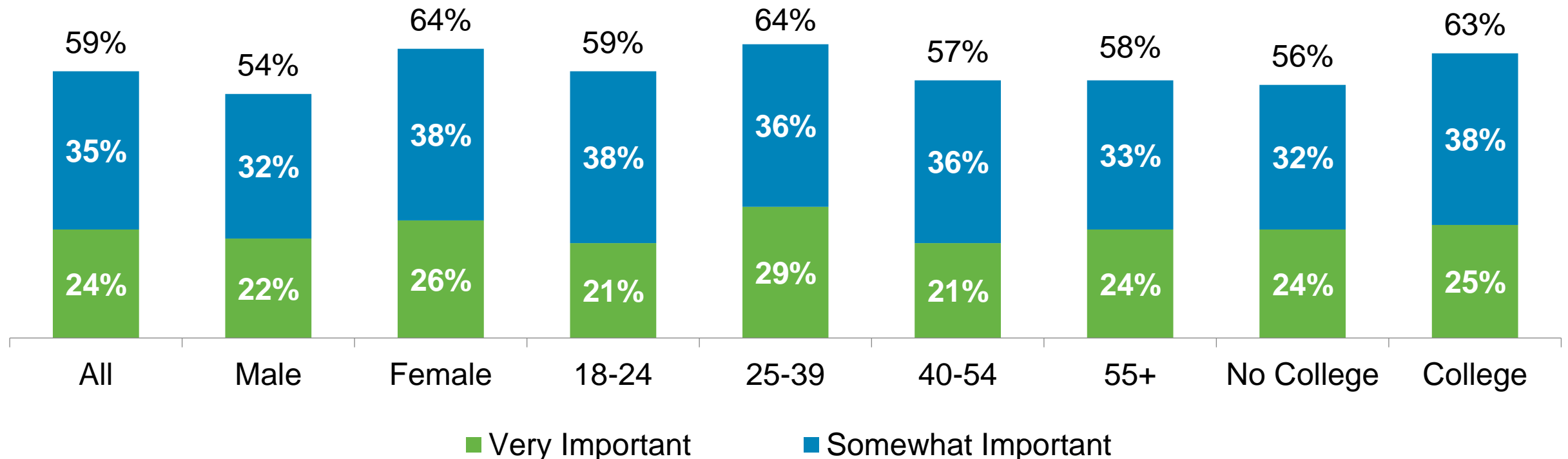


Source: A4A Air Travel Survey conducted by Ipsos (January 2023)

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)?

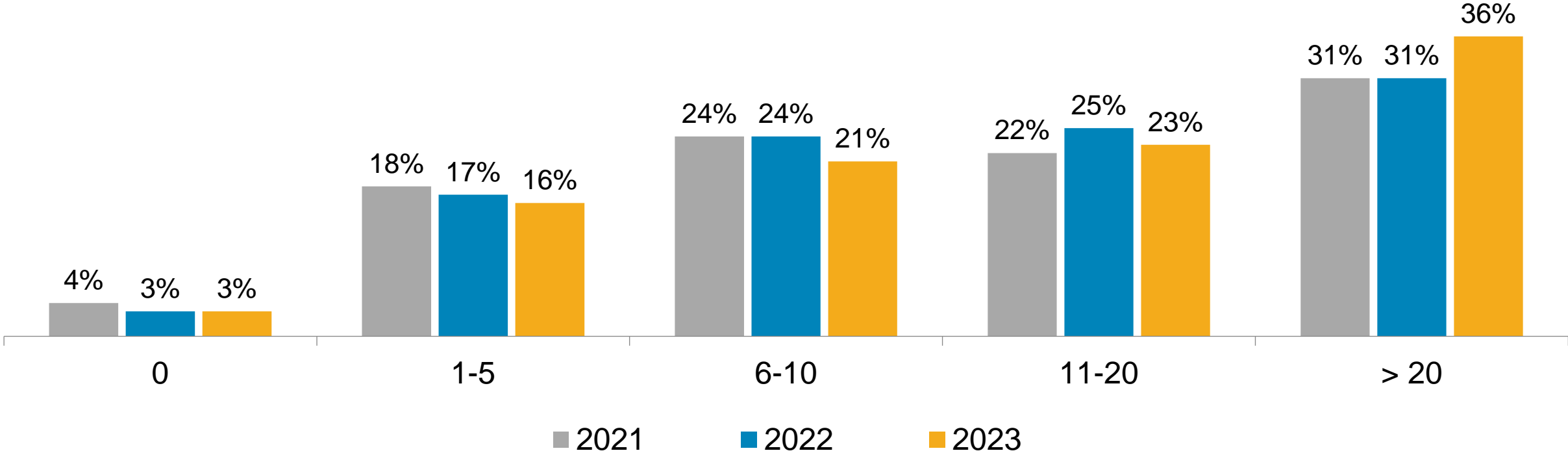


Source: Ipsos survey of American adults (January 2023)

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



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