



**Airlines for America<sup>®</sup>**

**We Connect the World**

## **Air Travelers in America**

Key Findings of a Survey Conducted by Ipsos

March 2024

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# About Ipsos

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- Ipsos is one of the world's largest market research and polling companies, operating 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 has been 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](http://www.ipsos.com)

## For more information on this study, please contact:

Chris Jackson  
Senior Vice President, US  
Public Affairs  
+1 (202) 420-2025  
[chris.jackson@ipsos.com](mailto:chris.jackson@ipsos.com)

# Ipsos Research Approach and Poll Accuracy

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These are some of the findings of an Ipsos poll conducted between **January 4-12, 2024**, on behalf of Airlines for America®. This poll screened a **national sample of 3,452 adults** (age 18 or older) to identify those who have “ever flown on an airplane” via the probability-based **Ipsos KnowledgePanel®** (“KP”). Of these, 3,019 respondents qualified for and completed the survey.

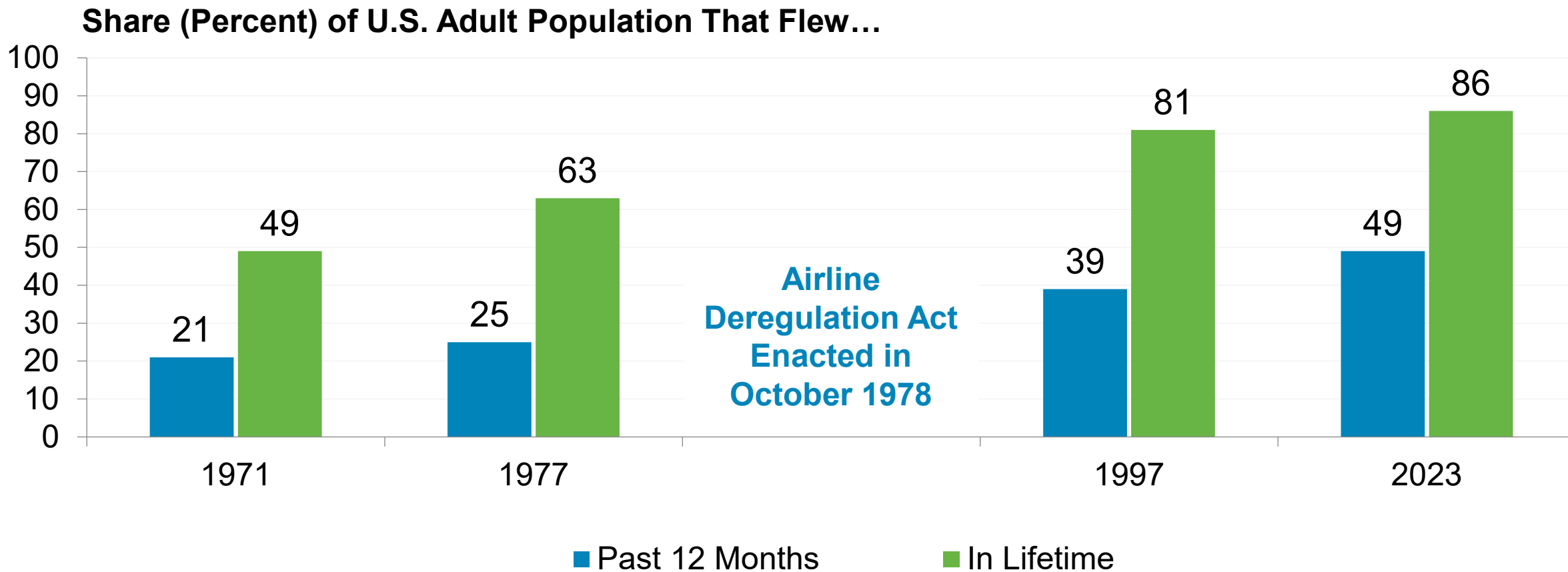
KP is the largest and most well-established online probability-based panel that is representative of the adult U.S. population. The Ipsos recruitment process employs a scientifically developed addressed-based sampling methodology using the latest Delivery Sequence File of the USPS—a database with full coverage of all delivery points in the US. 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. As a result, 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 sample data were weighted to adjust for gender by age, race/ethnicity, Census region, education, and household income. The demographic benchmarks came from the 2023 March Supplement of the Current Population Survey.

Note: The margin of sampling error for this study is plus or minus 1.76 percentage points at the 95% confidence level, for results based on the entire sample of adults and plus or minus 1.88 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 1.11 and 1.10, respectively. The margin of sampling error is higher and varies for results based on other sub-samples.

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

## Almost Nine in Ten Americans Have Flown Commercially; Half the Population Flew in 2023



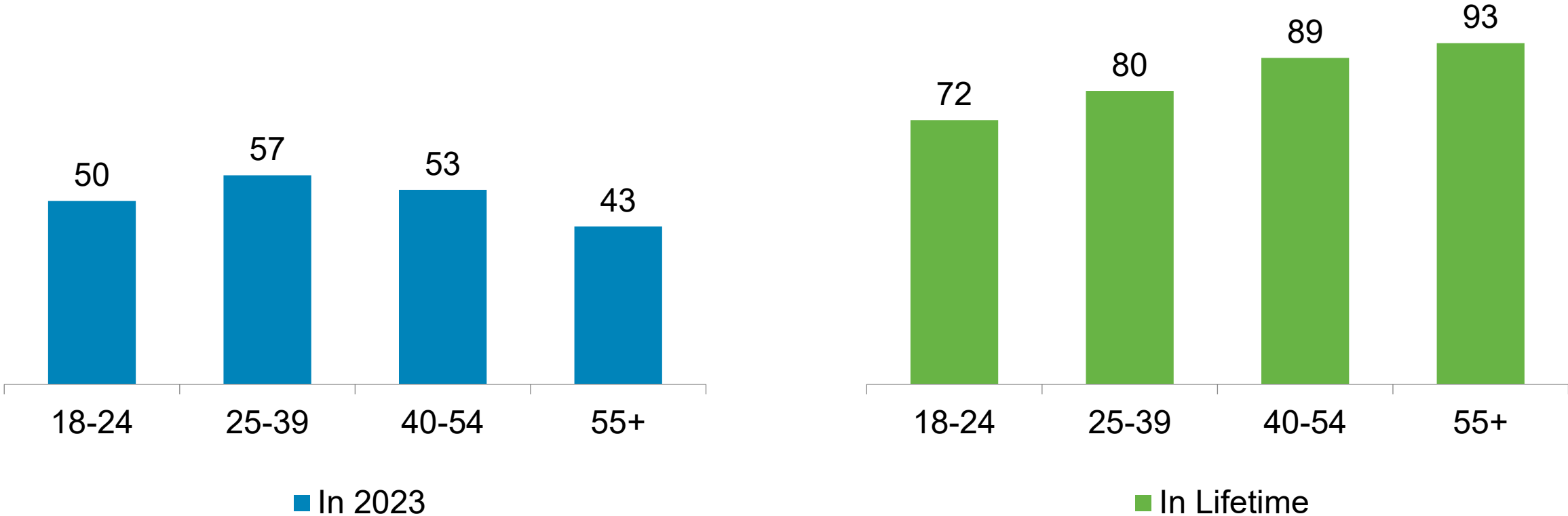
Sources: Historical A4A air travel surveys conducted by Gallup (1971 through 1997) and Ipsos

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

# Adults Aged 25-39 Had the Highest Propensity to Fly in 2023

93% of Americans Aged 55+ Have Flown in Their Lifetimes

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

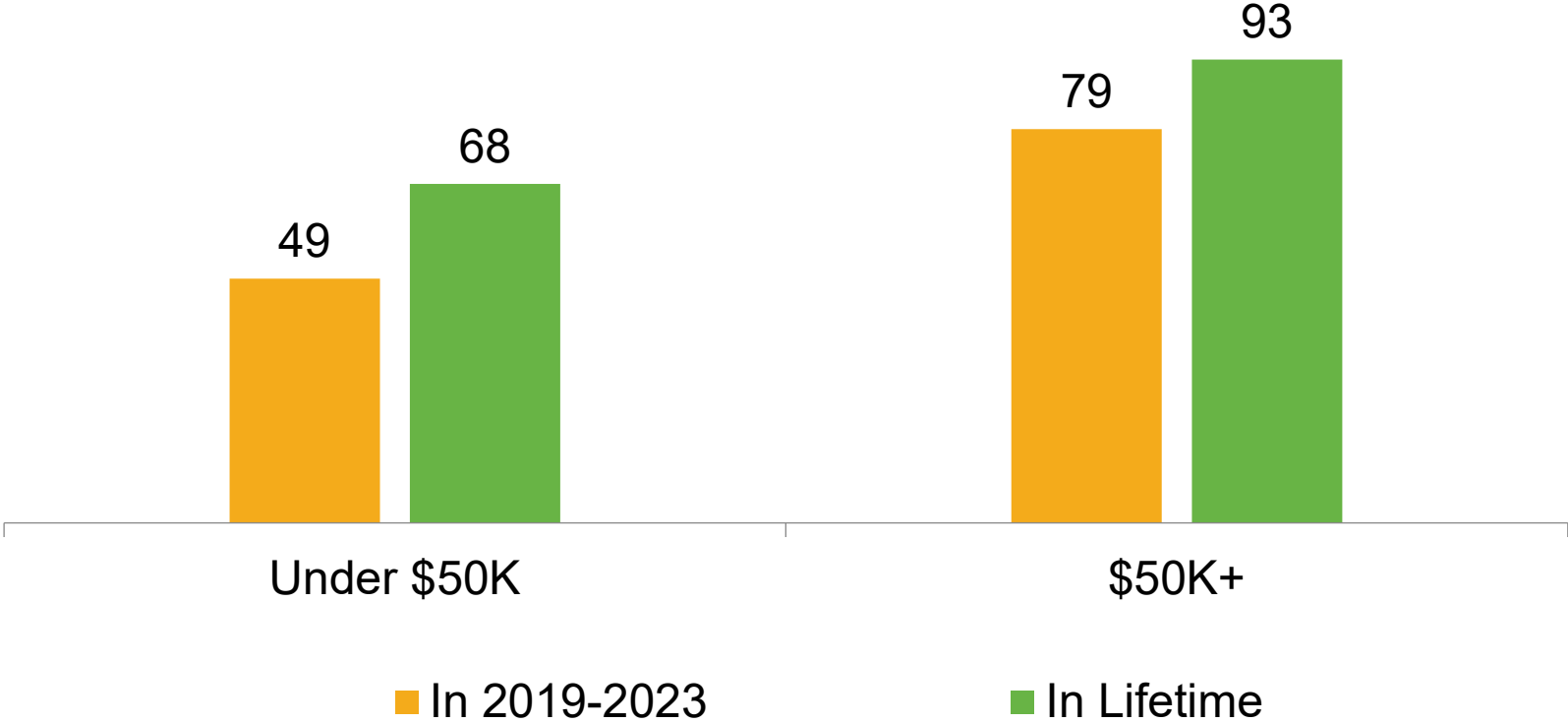


Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

# Air Travel Is Accessible to a Wide Range of Households

More Than Two-Thirds of Americans With Household Incomes Under \$50K Have Flown

### % Who Flew — By Household Income



Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

# Over the Past Five Years, 65% of Americans Experienced a Lower-Cost (LCC or ULCC) Airline

## 16% of Americans Flew a Foreign-Flag Carrier on at Least One Personal Trip

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*In the past five years, when traveling for personal reasons, which of the following types of airlines\* did you fly?*

Airline Group	%
U.S. global network airlines (American/Delta/United)	73
U.S. low-cost or hybrid airlines (Alaska/Hawaiian/JetBlue/Southwest)	45
U.S. ultra-low-cost airlines (Allegiant/Avelo/Breeze/Frontier/Spirit/Sun Country)	20
Non-U.S. airline (Air Canada, Aeromexico, British Airways, JAL, QANTAS)	16

\* Check all that apply

Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

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# Nine Percent of Americans Expect to Take the Majority of 2024 Domestic Flights on a ULCC

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*In 2024, for a **domestic** U.S. trip, on which of the following airlines do you expect to take the **majority** of flights?*

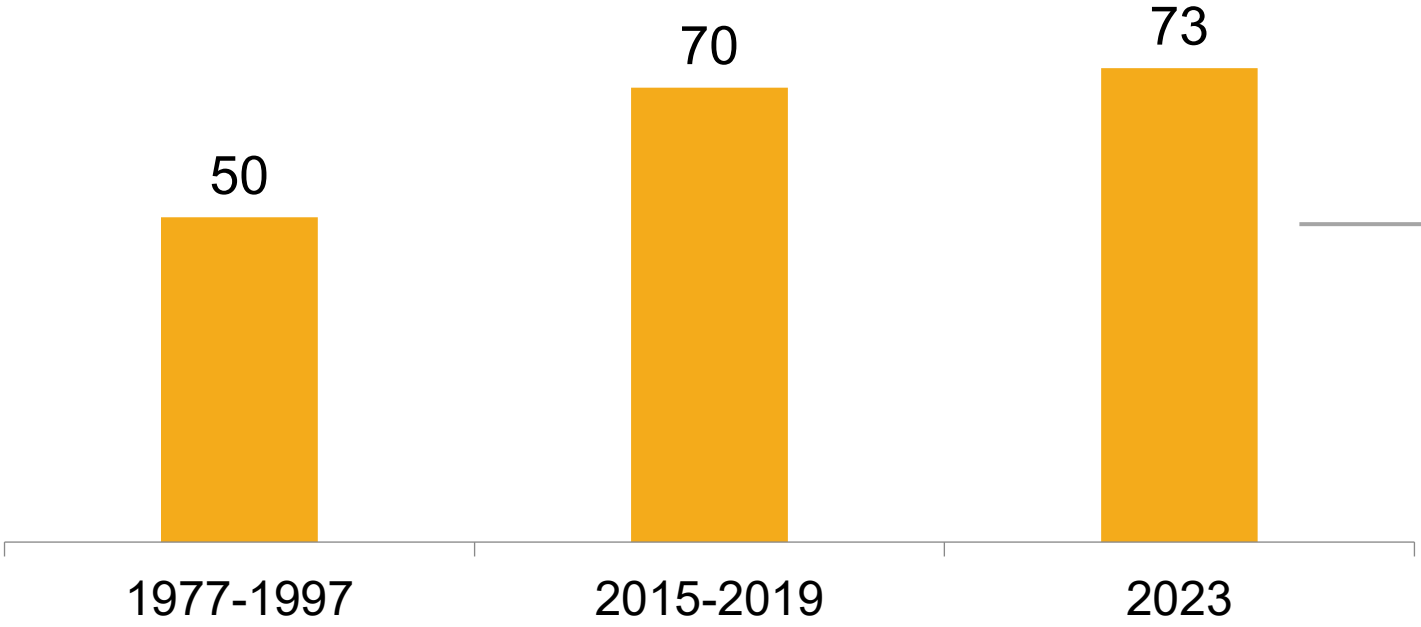
<b>Airline Group</b>	<b>%</b>
Alaska, American, Delta, Hawaiian, JetBlue, Southwest, United	78
Allegiant, Avelo, Breeze, Frontier, Silver, Spirit, Sun Country	9
None of the above	12
No response	1

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Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

# In 2023, Among Americans, More Than 70% of Air Trips Were Taken for Personal Reasons

Approximate Personal\* Share (Percent) of Trips



	Business	Personal
DOM	23%	55%
INT	3%	19%
<b>Total</b>	<b>27%</b>	<b>73%</b>

Note: Totals may not add to 100 due to rounding

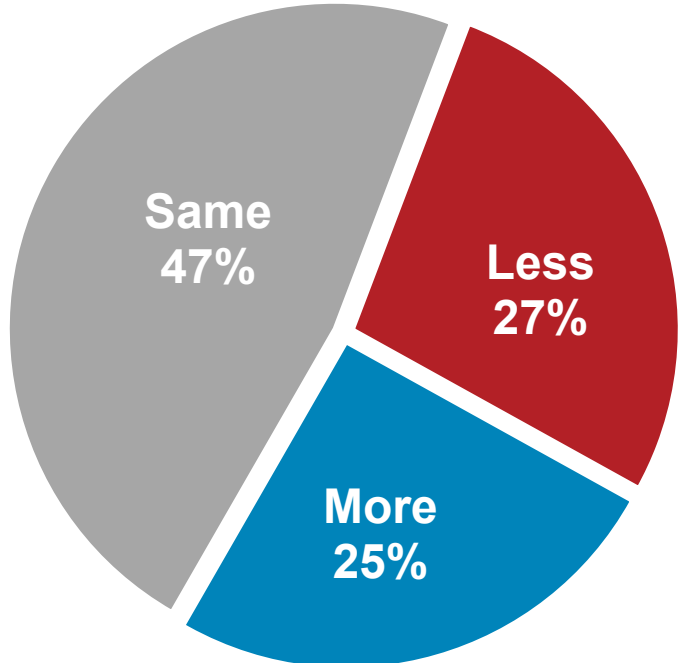
Source: A4A Air Travel Survey conducted by Ipsos (2015-Present) and Gallup (1977-1997)

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

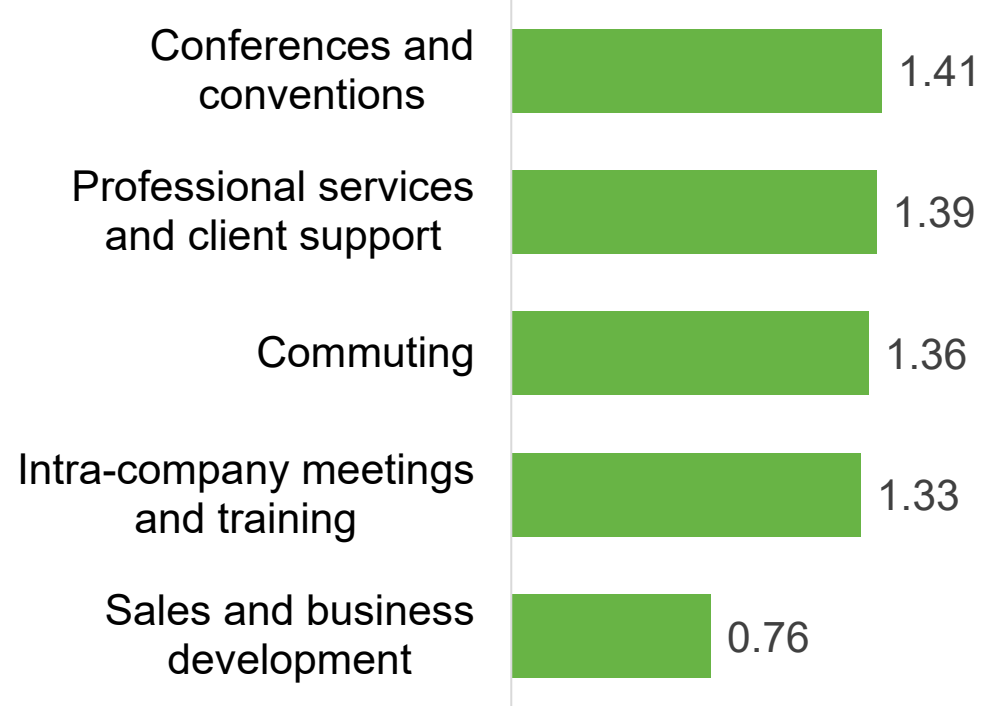
# Most Flyers Report Taking at Least as Many Business Trips as Before the Pandemic

## Attending Conferences and Providing Professional Services Account for the Most Business Trips

Are you **flying** less/more/the same **for business** today than you did pre-Covid?



In 2023, approximately how many airline **trips** did you take for each of the following **business purposes**?



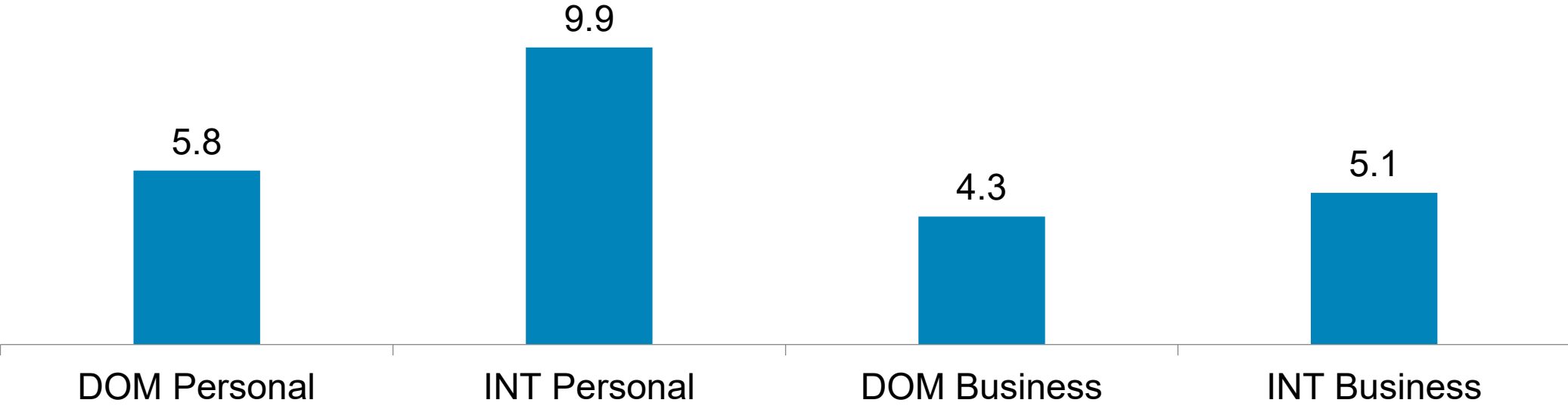
Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

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

# In 2023, International Trips Taken for Personal Reasons Averaged 10 Nights

## Domestically, Personal Trips\* Averaged Six Nights

*On average, 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 2024)

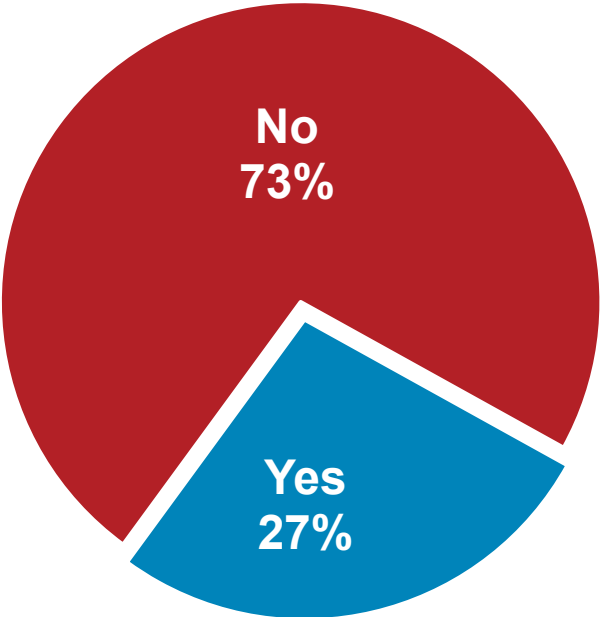
\* Includes leisure/recreation as well as traveling to/from college, family event, job interview, funeral, medical matters, etc.

# More Than 25% of Those With Flexible Work Arrangements Report Taking More Leisure Trips

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

*In 2023, did you take more trips in the past year **for leisure** because you had a **flexible work arrangement**?*



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Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

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

## More Than Half of Those Who Flew in 2023 Ranked Ticket Prices/Value Number One

*In choosing among flights from multiple airlines, which of the following criteria are most important to you?  
(1 = most important; 7 = least important)*

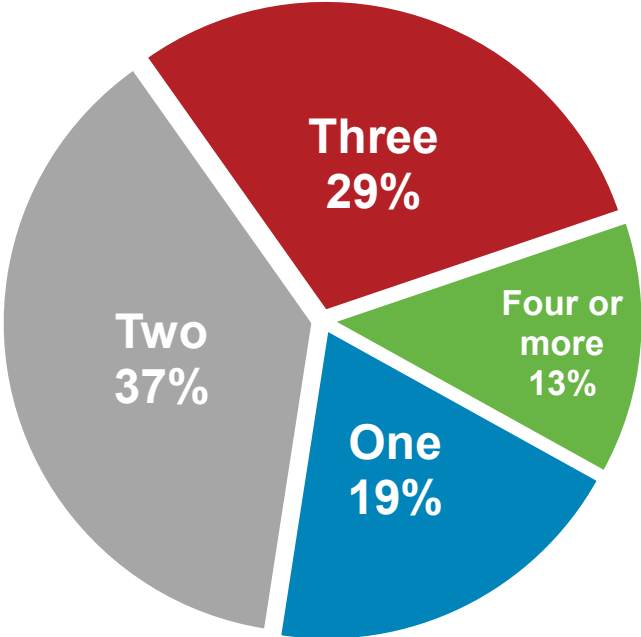
Criteria for Choosing Among Flights	Overall Rank	Mean Score	% of Respondents Ranking #1
Ticket price/value	1	1.9	53
Nonstop flight option (vs. connecting)	2	2.6	23
Departure/arrival time	3	2.7	14
Seat comfort	4	4.3	2
Loyalty/frequent flyer program points/miles/perks	5	4.7	6
Availability/quality of inflight Wi-Fi/entertainment	6	5.8	1
Availability/quality of food/beverage service	7	5.9	1

Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

# When Traveling for Personal Reasons, ~80% of Air Travel Consumers Consult More Than One Site/Agency/Company; 57% Spend an Hour or Less Researching Flight Options

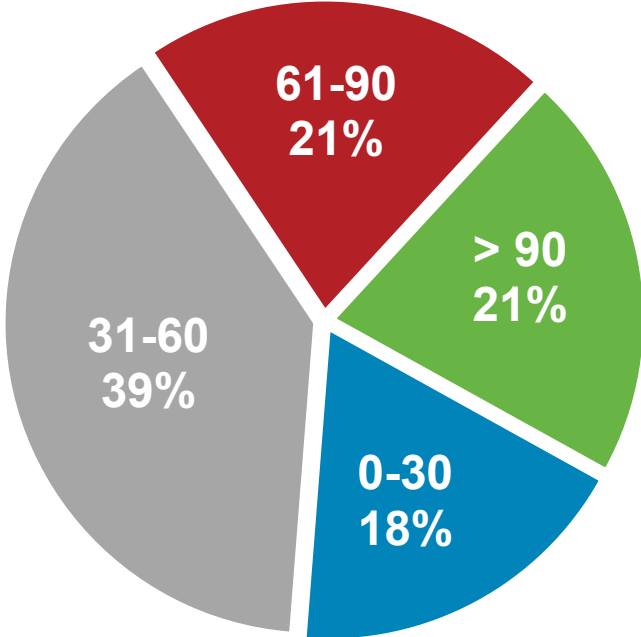
*When traveling for personal reasons, how many sites/agencies/companies do you typically visit/call when researching air travel options before making a purchase?*

**Sites/Agencies/Companies Consulted**



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

**Minutes Spent Researching Options**

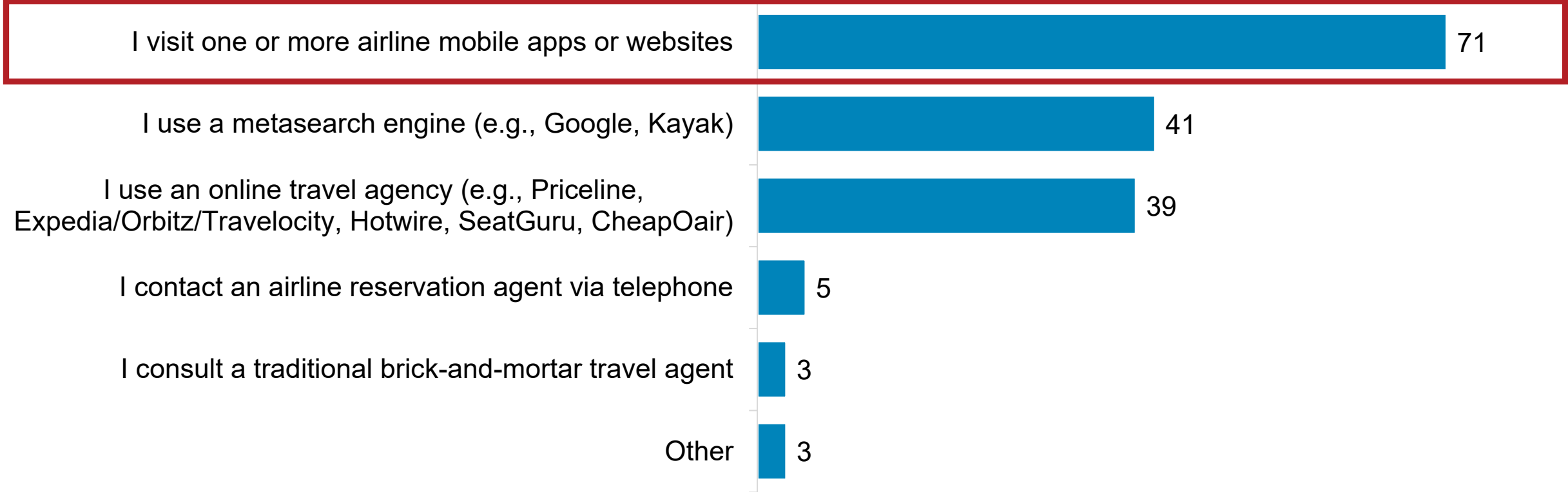


Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

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

# Of Those Flying for Personal Reasons, 71% 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)*



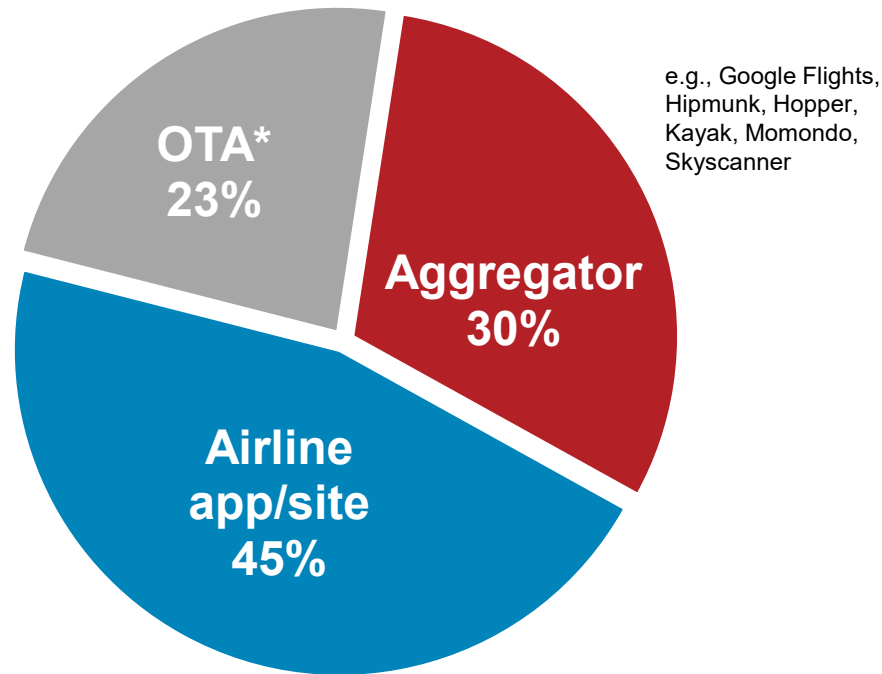
Source: A4A Air Travel Survey conducted by Ipsos (January 2024)



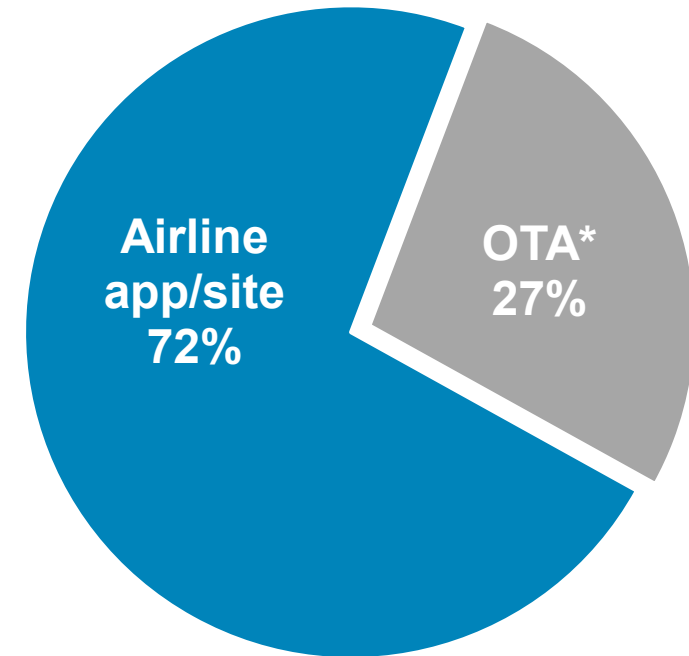
# When Shopping for Flights Online, 45% of Consumers Prefer Airline Apps or Websites

## When Purchasing Flights Online, More Than 70% 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 2024)

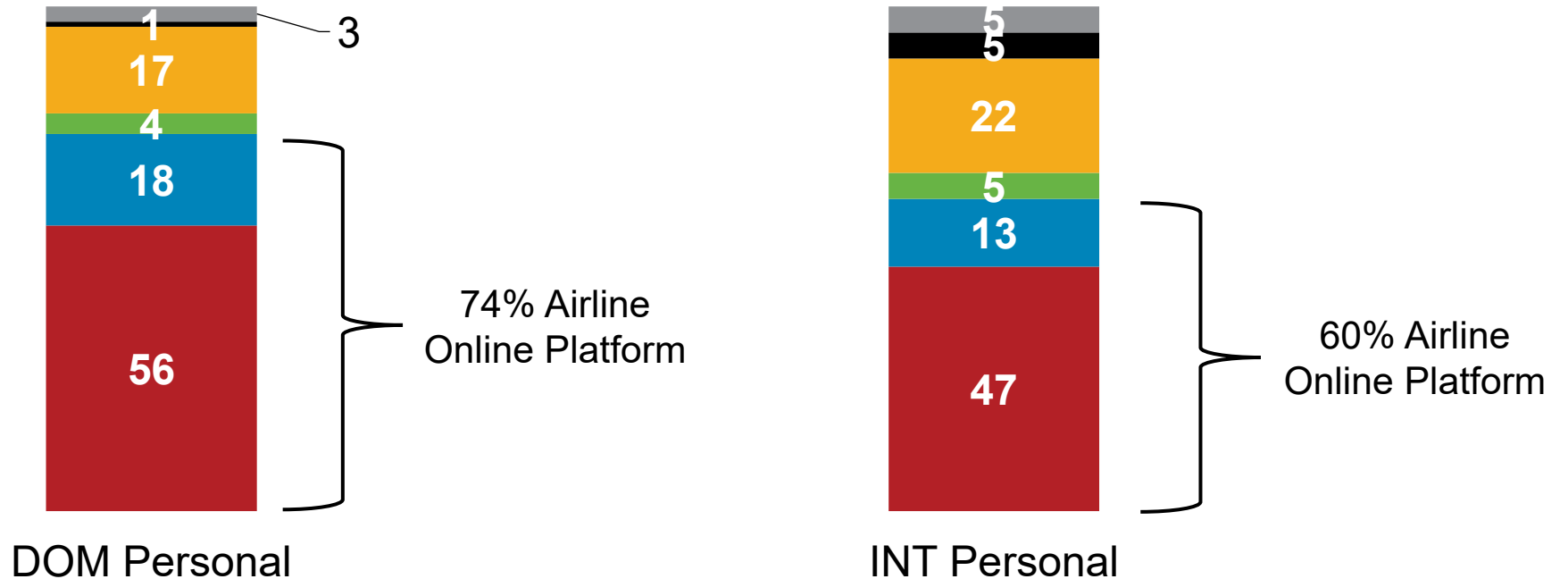
\* Online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair)

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

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

74% Typically Book Domestic Trips Via Airline Apps or Sites; 60% Do the Same for International Trips

When flying for **personal** reasons, which **resource** do you typically use to book your flight?



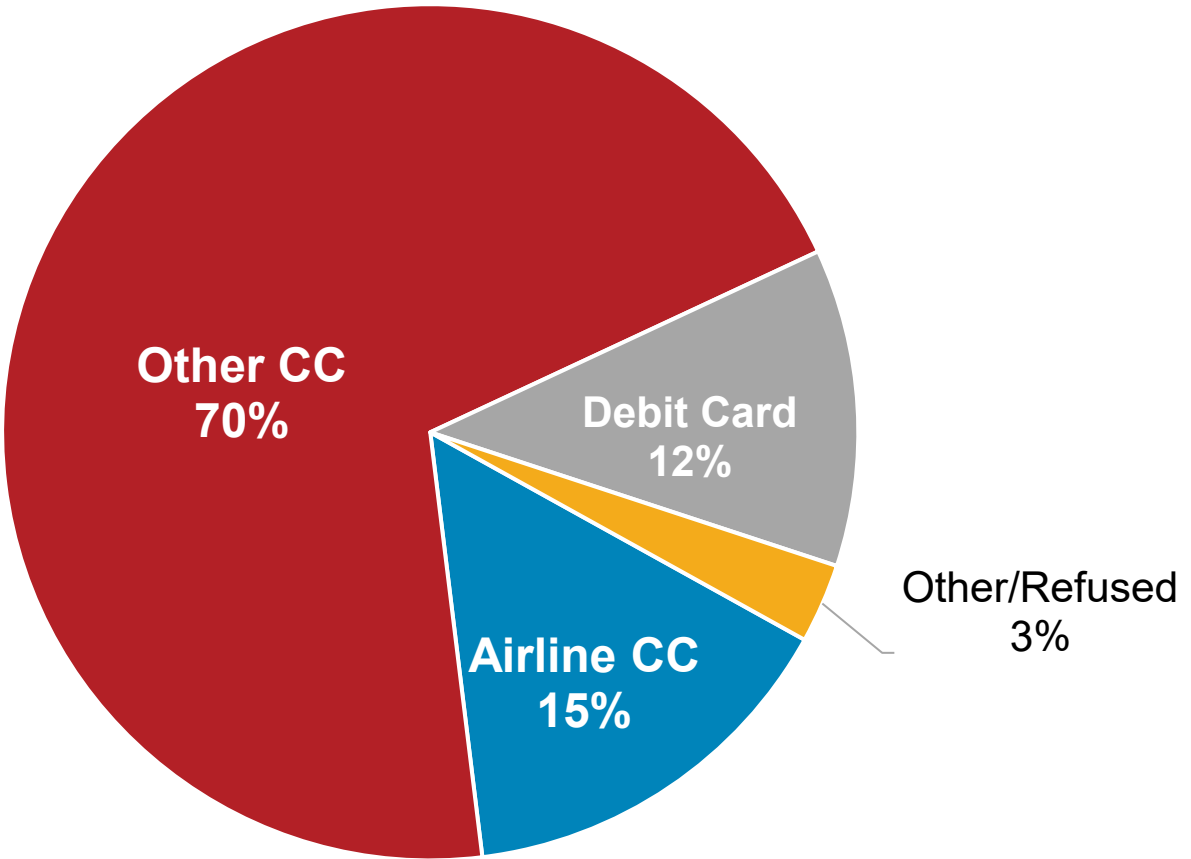
■ Airline website ■ Airline app ■ Airline agent ■ OTA\* ■ Traditional agency ■ Other

Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

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

# In 2023, 85% 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 2024)

# Half of 2023 Flyers Purchased a Basic Economy/Unbundled Ticket to Obtain a Lower Fare

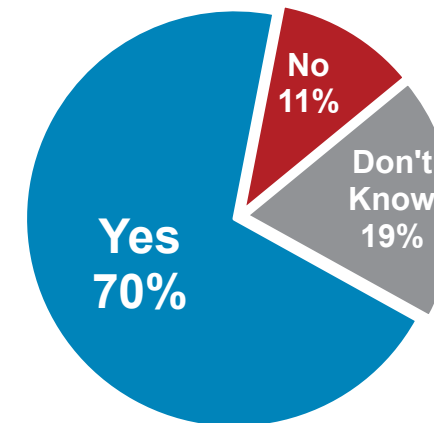
Of Those, 70% Would Consider Doing So Again; 19% Are Unsure

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*At any point in 2023, in exchange for a lower fare, did you purchase a ticket where seat selection and/or baggage (checked and/or carry-on) cost extra?*

*Would you consider purchasing such a ticket again?*

Response	%
Yes	51
No	48
No response	1



# In 2023, 88% of American Travelers Checked in Electronically — Up 11 Points From 2019

## More Than Half of Flyers Check in Using Mobile Devices

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

Typical Means of Checking In	2019 %	2023 %	Change (Pts.)
Mobile device/app	29	55	+ 26
Airline website	23	18	- 5
Automated kiosk at the airport	25	15	- 10
<b>Subtotal electronic</b>	<b>77</b>	<b>88</b>	<b>+ 11</b>
Airport ticket counter	18	10	- 8
Airport skycap (curbside)	4	1	- 3
Other/skipped	1	1	—
<b>Subtotal non-electronic</b>	<b>23</b>	<b>12</b>	<b>- 11</b>

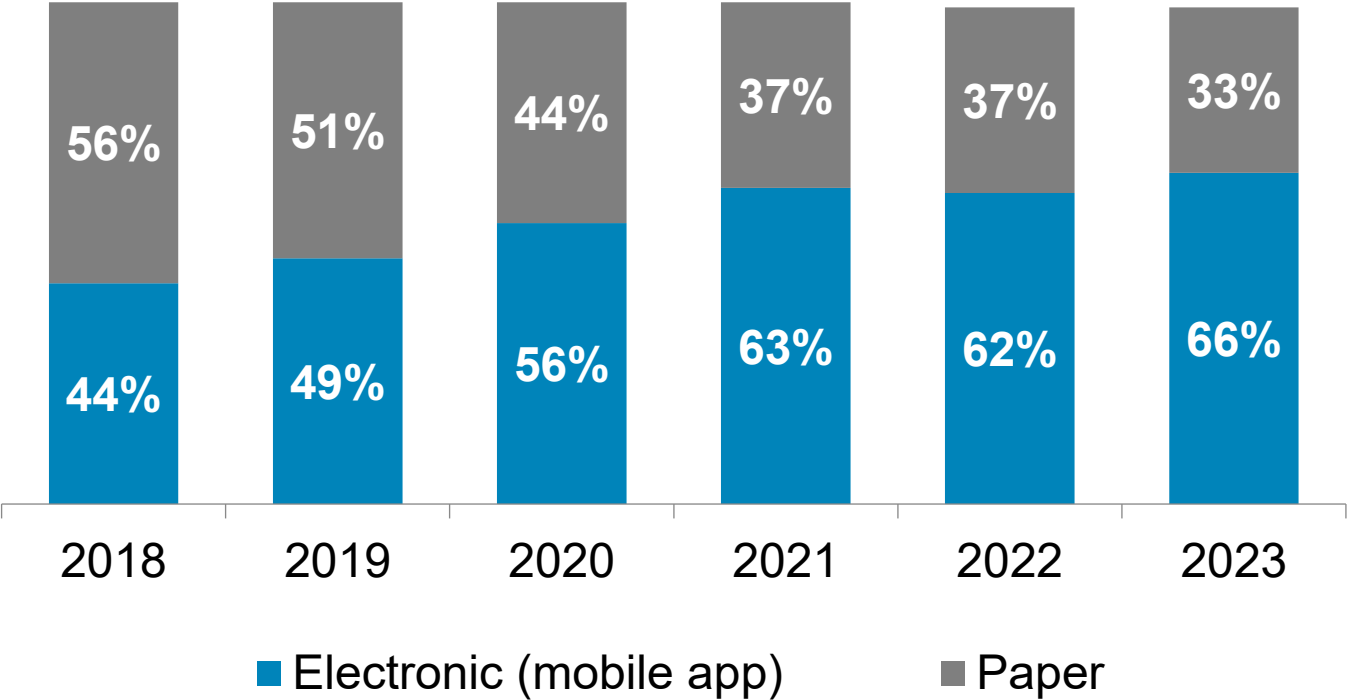
Source: A4A Air Travel Survey conducted by Ipsos

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

# Almost Two-Thirds of Flyers Use Their Mobile Devices to Board the Aircraft

## Use of Electronic Boarding Passes Up 22 Points From 2018

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



Source: A4A Air Travel Survey conducted by Ipsos

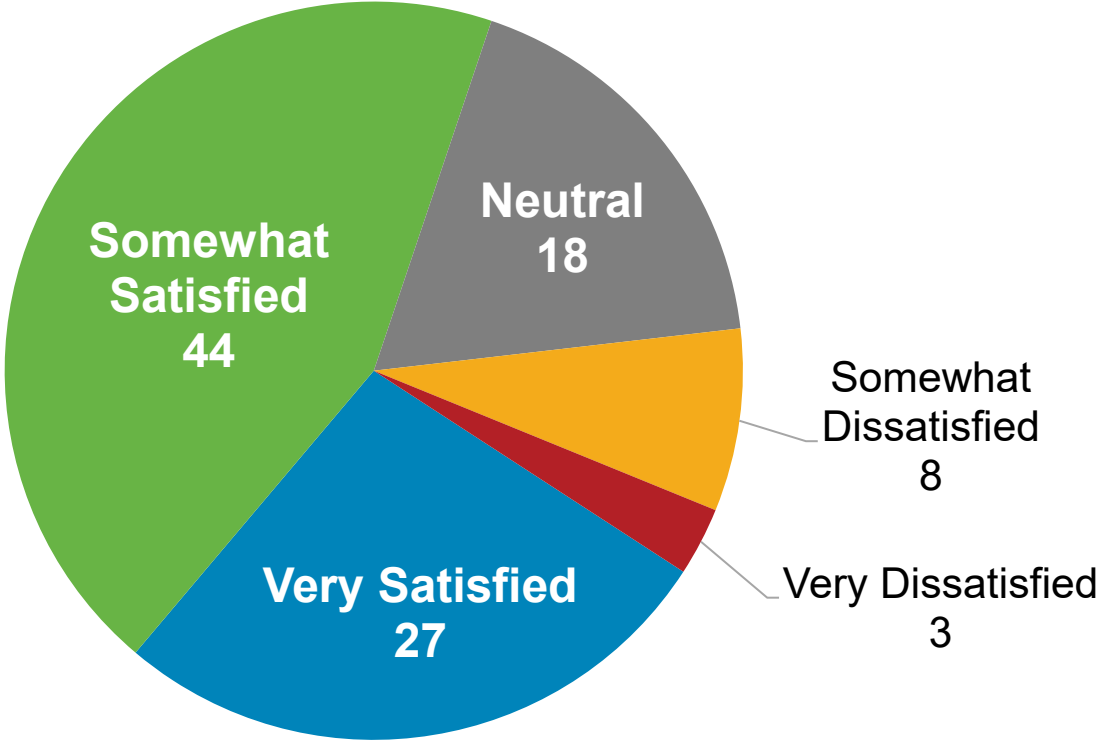
Note: Totals may not add to 100 due to rounding.

# 71% of Flyers Reported Being Satisfied With Their Overall Air-Travel Experience in 2023

Only 3% Reported Being “Very Dissatisfied”

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



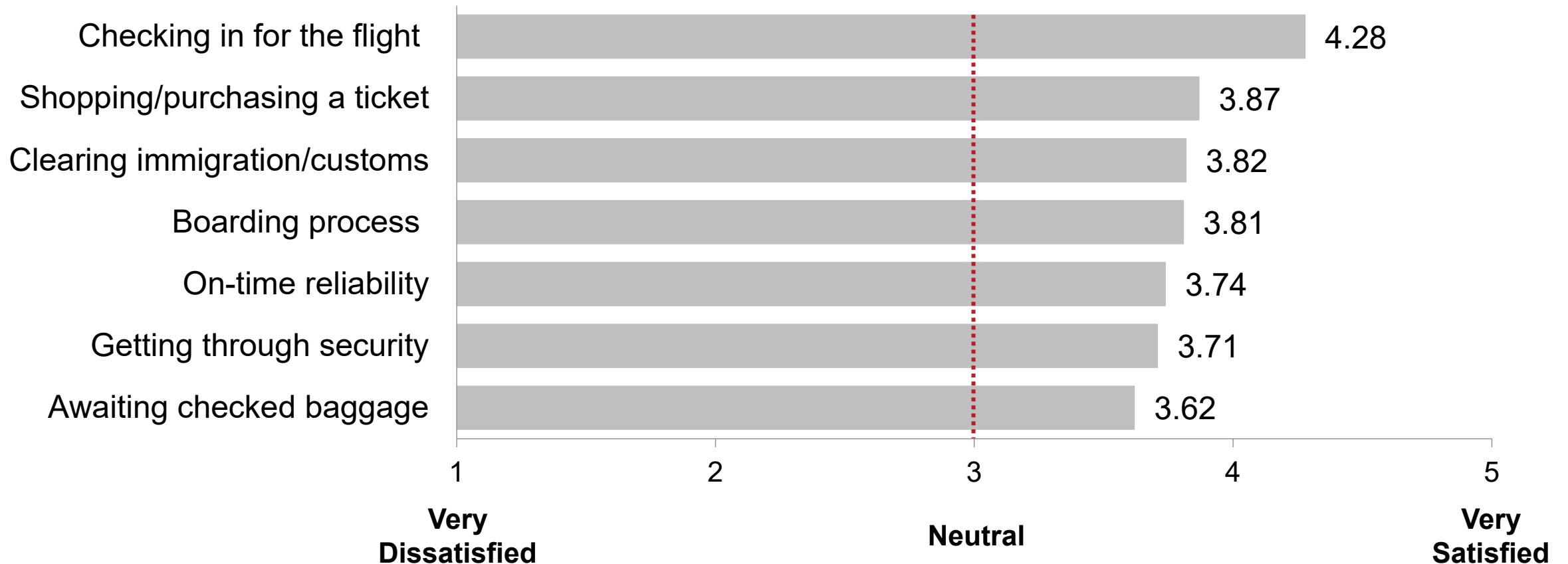
Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

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# Flyers Give Highest Marks to the Check-In Process and Ticket Shopping/Purchasing

All Five Satisfaction Criteria Received Scores Higher Than 3 (“Neutral”)

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 2024)



# Customers Continue to Want Low Prices Above All Else

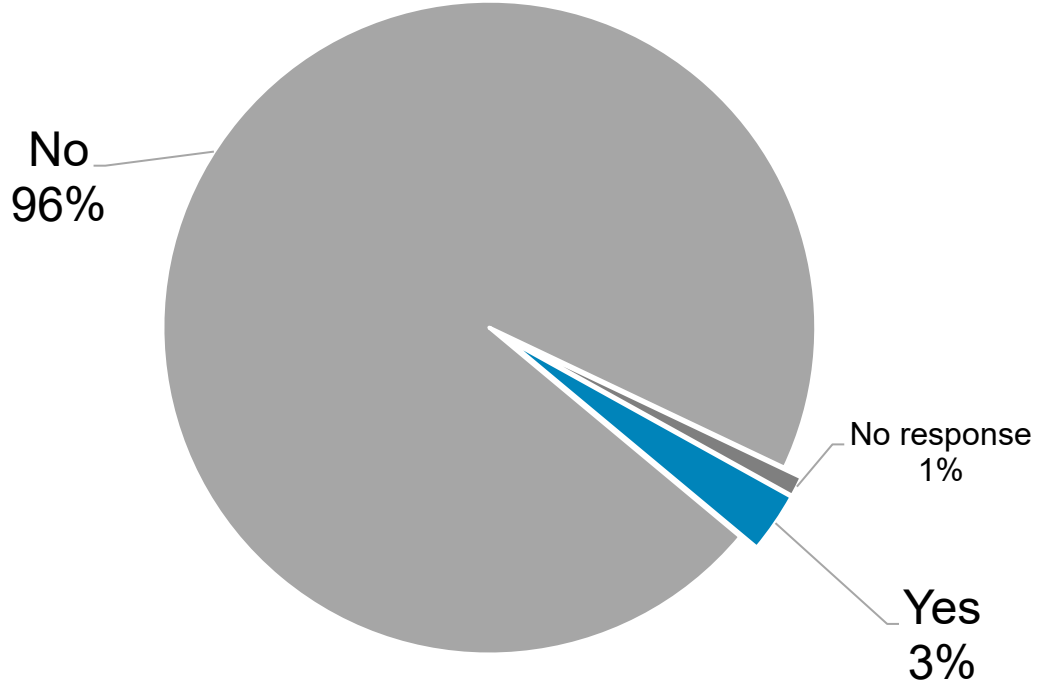
*Of the following potential changes to commercial air travel, which would have the most positive impact on your traveling experience? (1 = most positive impact, 5 = least impact)*

Potential Changes to Air Travel	Overall Rank	Mean Score	% of Respondents Ranking "1"
Lower prices (fares/fees)	1	1.51	68
Better flight schedules	2	2.52	13
More comfortable seats	3	2.86	14
More room for carry-on luggage	4	3.67	2
Better Wi-Fi	5	4.44	2

Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

# Though Very Few Flyers Purchase a Voluntary Carbon Offset, Many Indicate a Willingness to Pay a Small Amount More for Flights to Help Airlines Increase Environmental Sustainability

At any point in 2023, did you purchase a **carbon offset** for your trip or make a **donation to a fund** for sustainable aviation fuel (SAF)?



How much **more (per ticket)** are you willing to pay to help airlines increasing the environmental sustainability of their day-to-day operations?



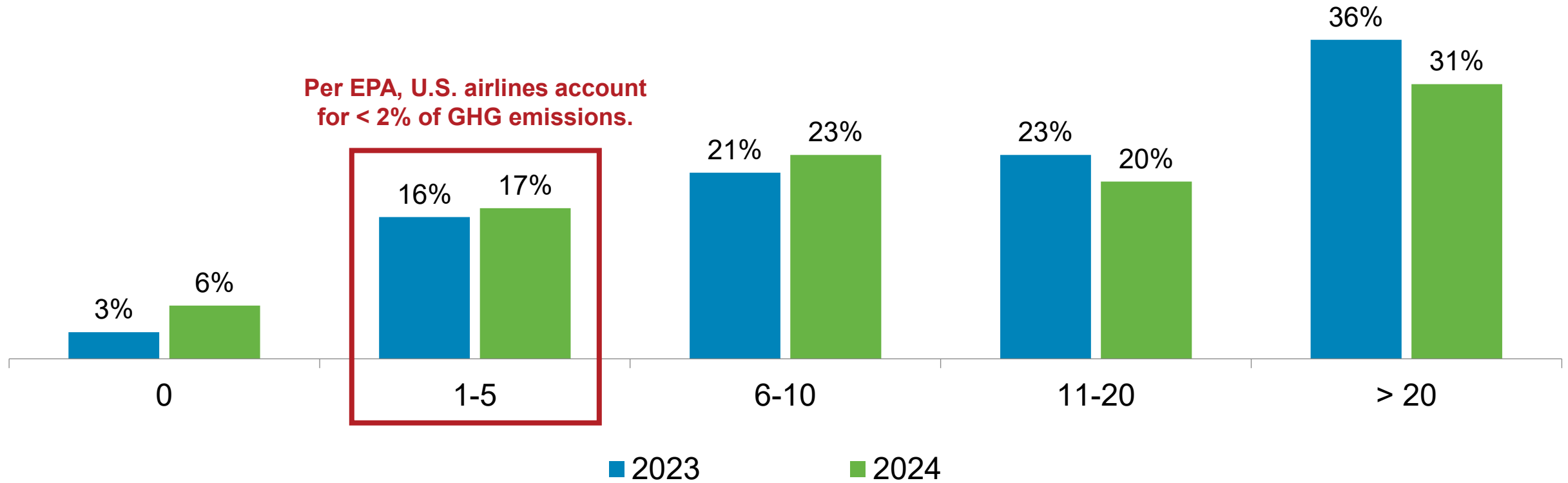
Source: A4A Air Travel Survey conducted by Ipsos (January 2024)

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

# 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: A4A Air Travel Survey conducted by Ipsos (January 2023 and 2024)

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



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