Status of Air Travel in the USA
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Airlines for America® (A4A) sought to better understand various aspects of the American airline traveler in 2015:

- Who is traveling by air, why, where and how often;
- How many Americans traveled by airline in 2015;
- What logistical decisions did 2015 travelers make including how much luggage to take, how many nights to stay, what kind of tickets they buy;
- What are their upcoming travel plans in 2016; and
- What are the investments that travelers believe are the most crucial in the coming years.

This study references similar research conducted by Gallup on behalf of the Air Transport Association of America in 1998 for trending purposes. The 1997 study was a random sample of 3,016 Americans age 18+ conducted via telephone.
Executive Summary

**Airline Travel 2015**
% of US Adult Population

- Ever flown: 81%
- Flew in 2015: 45%
- Flew business 2015: 17%
- Flew personal 2015: 42%

**The 2015 American Adult Flyer at a Glance**

**Gender**
- Male: 50%
- Female: 50%

**Race/Ethnicity**
- White: 67%
- Black: 17%
- Hispanic: 8%
- Asian: 6%
- Other: 2%

**Age**
- 18-34: 35%
- 35-54: 30%
- 55+: 6%

**Airline Travel 1971-2015**
% of US Adult Population

- Ever flown
  - 1971: 49
  - 1972: 55
  - 1973: 65
  - 1974: 70
  - 1975: 73
  - 1976: 76
  - 1977: 81
  - 1978: 45
  - 1979: 65
  - 1980: 70
  - 1981: 73
  - 1982: 76
  - 1983: 81
  - 1984: 45
  - 1985: 81
  - 1986: 39
  - 1987: 45
  - 1988: 32
  - 1989: 29
  - 1990: 28
  - 1991: 17
  - 1992: 24
  - 1993: 24
  - 1994: 21
  - 1995: 24
  - 1996: 24
  - 1997: 21
  - 1998: 21
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  - 2008: 21
  - 2009: 21
  - 2010: 21
  - 2011: 21
  - 2012: 21
  - 2013: 21
  - 2014: 21
  - 2015: 21

**2015 Flyer Satisfaction**

- Satisfied: 80%
- Neither: 14%
- Dissatisfied: 6%
Q3. In 2015, how many trips did you take on airlines for the following purposes?
Count each roundtrip as a single trip and include any trips planned for the last few weeks of 2015.
People took flights for many reasons in 2015

Total Trips Taken
2015 Airline Travelers

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Trips Taken</th>
<th>Average Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business purposes</td>
<td>1,995</td>
<td>1.5</td>
</tr>
<tr>
<td>Personal leisure purposes</td>
<td>3,314</td>
<td>2.3</td>
</tr>
<tr>
<td>Personal non-leisure purposes</td>
<td>1,339</td>
<td>1.0</td>
</tr>
</tbody>
</table>

* Compared to 47% in 1997

Q3. In 2015, how many trips did you take on airlines for the following purposes? Count each roundtrip as a single trip and include any trips planned for the last few weeks of 2015.
2015 Flyers Come From Across the United States

2015 Airline Flyers by Home Location
(brackets represents % entire U.S. population)

- New England: 5% (4%)
- Middle Atlantic: 14% (14%)
- South Atlantic: 25% (23%)
- Pacific: 17% (15%)
- Mountain: 9% (9%)
- West North Central: 7% (7%)
- East North Central: 13% (14%)
- East South Central: 3% (4%)
- West South Central: 9% (9%)
2015 Flyers Come from Urban and Rural Areas

2015 Airline Flyers by Home Population
(outline represents % entire U.S. population)

- 5M+ (Urban): 29% of 2015 flyers, 33% of all Americans
- 1-4.9M (Semi-urban): 33% of 2015 flyers, 34% of all Americans
- <1M (Town/Suburban): 25% of 2015 flyers, 27% of all Americans
- Non-metro (Rural): 8% of 2015 flyers, 11% of all Americans

All Americans: 2015 flyers
For Americans Airline Travel is Mostly Domestic

### Individual/Personal Travel to Region

**2015 Airline Travelers – Personal Reasons**

<table>
<thead>
<tr>
<th>Region</th>
<th>% of all Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>63%</td>
</tr>
<tr>
<td>Canada</td>
<td>5%</td>
</tr>
<tr>
<td>Mexico</td>
<td>5%</td>
</tr>
<tr>
<td>Central America</td>
<td>5%</td>
</tr>
<tr>
<td>South America</td>
<td>4%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>5%</td>
</tr>
<tr>
<td>Europe</td>
<td>8%</td>
</tr>
<tr>
<td>Africa</td>
<td>2%</td>
</tr>
<tr>
<td>Middle East</td>
<td>2%</td>
</tr>
<tr>
<td>Australia/Asia</td>
<td>3%</td>
</tr>
</tbody>
</table>

Latin ≥ 14%

Q6. What was your destination for the personal flights you took in 2015? Please specify the number of air trips to each location.
Trip Duration

- Most personal trips last less than one week.
- The average across domestic and international is 6.6 nights.

How many nights stayed?

Q7. On average, how many nights did you stay at your destination when you took the following types of trips? Q8. When you travel via airline on personal trips, how many people do you usually travel with?

Average 5.7 nights
Average 7.7 nights
Travelers going to an international location are likely to check more items than those traveling domestically.

- Personal travelers check an average 1.1 pieces of luggage.
- Of all personal checked bags in 2015, more than half did not require payment.

Q10-11. How many items did you check?/How many checked items required payment?
Electronic Devices Owned

- Air travelers are a tech-savvy group: nearly all travelers own some type of computer.
- Smartphones are also popular: more than three-quarters of flyers own a smartphone.
- 70% of flyers own a tablet or e-Reader, vs. 60% for the overall population

Q. Which of the following do you have in your household?
Booking tickets (what kind and where) for travelers

- Personal international travelers are twice as likely to splurge on premium seating as those traveling domestically. [56% vs. 28%]
- Those flying internationally are more likely to book travel from an online travel agency, such as Expedia, whereas most domestic travel was booked directly through the airline website.

Q12. What type of ticket do you (or your company) usually book for these kinds of flights? / Q14. What resource do you usually use to book travel for these kinds of flights?
The majority of personal domestic and international travelers book their tickets more than three weeks in advance of the date of departure. [65%, 59%]
The check-in and upgrade process for flyers

- Most travelers prefer to check in to their flights on a personal device, using either a personal computer or mobile device. Only 11% use the ticket counter.
- 23% of air travelers chose to purchase a seat upgrade in 2015.

Q15. What type of ticket do you (or your company) usually book for these kinds of flights? / Q16. Did you purchase a seat upgrade using money, points or miles on any flight?
Frequent Flyer Programs for travelers

- Two-thirds of 2015 flyers are a member of some airline frequent flyer program.

**Enrollment in frequent flyer programs**

- 55% Yes, frequent flyer program member, but do not have elite status
- 10% Yes, have elite status with a frequent flyer program
- 34% No

**Q17. Are you currently enrolled in any frequent flyer program and do you have any status giving you extra privileges?**
Nearly a fifth (19%) of travelers are enrolled in the TSA PreCheck security program. Only 13% are enrolled in CBP Global Entry.
2015 Air Traveler Satisfaction

- 80% of all 2015 flyers reported being somewhat or very satisfied with their overall air travel experience in 2015, including 35% very satisfied and 1% very dissatisfied.
- Flyers enrolled in expedited security screening programs reported even greater levels of satisfaction: 82% (49% very) for PreCheck; 95% (67% very) for Global Entry.

Satisfaction with Overall 2015 Air Travel Experience

Q25. Thinking about your overall experience with air travel over the past twelve months, how satisfied or dissatisfied are you?
While air travelers of all incomes and age groups reported satisfaction levels exceeding 70%, younger [88%] and middle class travelers [83%] reported the highest levels of satisfaction their 2015 air travel experience.

Q25. Thinking about your overall experience with air travel over the past twelve months, how satisfied or dissatisfied are you?
Prospective-Flight in 2016
2016 Flight Outlook

- Americans generally plan to take about the same number of flights next year.
- 2015 travelers are the most likely to fly again in 2016 – and to take even more flights, with the most popular type of trip being personal domestic trips.

**More or less flights in 2016**

- **All Americans:**
  - About the same number of flights: 55%
  - Fewer flights: 29%
  - More flights: 17%

- **Ever flown:**
  - About the same number of flights: 55%
  - Fewer flights: 29%
  - More flights: 16%

- **2015 Flyers:**
  - About the same number of flights: 52%
  - Fewer flights: 16%
  - More flights: 32%

**Purpose and Destination for Likely Flyers**

- **All Adults:**
  - Personal domestic: 53%
  - Personal international: 26%
  - Business domestic: 20%
  - Business international: 13%

- **Ever flown:**
  - Personal domestic: 52%
  - Personal international: 26%
  - Business domestic: 20%
  - Business international: 12%

- **2015 Flyers:**
  - Personal domestic: 40%
  - Personal international: 32%
  - Business domestic: 21%

Q21. In total, do you think you will take more or fewer flights in 2016 than you did in 2015? 
Q20. How likely are you to travel by airline for these reasons and destinations?
The cost and the time spent traveling are the most important factors in deciding whether to travel by air.

Airport amenities have the least effect on decision making.
Efficiency in the preflight experience is the most important factor for travelers, with efficiency in the security and boarding process ranked as most important preflight factors.

**Importance of Pre-Flight Factors**

<table>
<thead>
<tr>
<th>% Ranking 1 to 3 out of 7</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speed of getting through security</td>
</tr>
<tr>
<td>Efficiency of boarding process</td>
</tr>
<tr>
<td>Availability of free wifi</td>
</tr>
<tr>
<td>Restaurants/concessions</td>
</tr>
<tr>
<td>Airport lounges</td>
</tr>
<tr>
<td>Kiosk/app functionality</td>
</tr>
<tr>
<td>Charging stations at gate</td>
</tr>
</tbody>
</table>

Q23. In terms of your **preflight** experience at the airport, how would you RANK the following in importance?
Importance of inflight factors

- Space for both the travelers and their luggage is the most important factor for an inflight experience.
- 2015 travelers value inflight entertainment options more than people who have ever flown.

**Importance of In-Flight Factors**

% Ranking 1 to 3 out of 6

- Legroom/seat comfort: Ever flown 91%, 2015 Flyer 89%
- Space for carry-ons: Ever flown 77%, 2015 Flyer 75%
- Food and drink options: Ever flown 53%, 2015 Flyer 51%
- Wifi availability: Ever flown 30%, 2015 Flyer 31%
- Entertainment options: Ever flown 26%, 2015 Flyer 29%
- In-seat power: Ever flown 24%, 2015 Flyer 26%

Q24. In terms of your inflight experience, how would you RANK the following in importance?
Advice for CEO

- When asked to give advice to an airline CEO, all groups say that the highest priority should be improvements to onboard comfort; half put routes/schedules in top 3.
- Technology onboard the aircraft and the airline’s website or mobile applications are considered the lowest priority items, though those who traveled in 2015 are more likely to say these items are important.

### Key Issue to Address

% Ranking 1 to 3 out of 7

<table>
<thead>
<tr>
<th>Key Issue</th>
<th>Ever flown</th>
<th>2015 Flyer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboard comfort</td>
<td>74%</td>
<td>71%</td>
</tr>
<tr>
<td>Customer service</td>
<td>59%</td>
<td>54%</td>
</tr>
<tr>
<td>Route network/schedule</td>
<td>46%</td>
<td>49%</td>
</tr>
<tr>
<td>Airport improvements</td>
<td>36%</td>
<td>35%</td>
</tr>
<tr>
<td>Fleet</td>
<td>36%</td>
<td>34%</td>
</tr>
<tr>
<td>Onboard technology</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>Website and apps</td>
<td>21%</td>
<td>26%</td>
</tr>
</tbody>
</table>

Q26. If you were able to advise the CEO of a major airline on how to prioritize future customer-oriented investments in the airline, how would you RANK the following?
Preference on tickets

- Two-thirds of Americans prefer the à la carte pricing model in which they pay only for those airline services/amenities that they need or want.
- This preference is highest among the least affluent households.

**Ticket Type Preference**

<table>
<thead>
<tr>
<th>All Americans</th>
<th>Ever Flown</th>
<th>Flown in 2015</th>
<th>HH Income Under $100K</th>
<th>HH Income $100-150K</th>
<th>HH Income $150K</th>
<th>Flew more than five times in 2015</th>
<th>18-34 year old</th>
<th>35-54 year old</th>
<th>55+ year old</th>
</tr>
</thead>
<tbody>
<tr>
<td>67%</td>
<td>67%</td>
<td>64%</td>
<td>68%</td>
<td>64%</td>
<td>52%</td>
<td>52%</td>
<td>62%</td>
<td>68%</td>
<td>67%</td>
</tr>
<tr>
<td>33%</td>
<td>33%</td>
<td>36%</td>
<td>32%</td>
<td>36%</td>
<td>48%</td>
<td>48%</td>
<td>38%</td>
<td>32%</td>
<td>33%</td>
</tr>
</tbody>
</table>

Q27. Which of the following statements do you agree with:

- “I like paying one all-inclusive ticket price for a bundle/package of services (e.g., seat assignment, checked bag(s), meal), even if it’s more expensive”
- “I prefer to pay only (à la carte) for those airline services/amenities that I want/need, so my ticket ends up being less expensive”
Recap
Recap: Looking forward to 2016

- Americans are bullish about airline travel in 2016.
  - 75% of 2015 airline travelers and 53% of all Americans say they are somewhat or very likely to travel by airline this year.
  - Almost a third (29%) of all Americans say they will take more flights in 2016 along with the majority (55%) who expect to fly at the same rate.

- Price, convenience and reliability are the main reasons Americans choose to fly (rather than drive, take rail or other forms of transit).
  - Generally, airport or inflight amenities, while appreciated, are not major reasons to select airline travel as the preferred travel method.

- And Americans are mostly looking for a hassle-free experience when they fly.
  - 79% of Americans say ease and speed of getting through security is a top priority and 77% say the ease or efficiency of the boarding process is a top priority (1-3 out of 7).
  - 91% say legroom is their top priority on the plane (1-3 out of 6), followed by 77% who want space for a carry-on.
Recap: Airline Travel Trends in 2015

- While the fraction of Americans who have ever flown has not changed dramatically in the last 18 years, the fraction of Americans currently flying has climbed and more Americans have access to air travel than ever before.
  - In 2015, 81% of the American public reported experiencing airline travel in their lifetime. This is unchanged from 1997 (also 81%) but up significantly from 1971 (49%) the first year on record.
  - The fraction of Americans reporting airline travel in the last year is 45%, up from 39% in 1997, 31% in 1986 and 21% in 1971.
  - Younger travelers (35% of all airline travelers in 2015) and people with less than $50,000 household income (35% of all airline travelers in 2015) are more likely to fly today than 18 years ago.

- However, the nature of airline travel has changed dramatically since 1997. In 1997, 47% of all trips were for business purposes. In 2015, that figure fell to 31%.

- The large majority – 80% – of airline travelers in 2015 report being satisfied with their overall airline travel experience in the past year.