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## **Air Travelers in America: Survey Highlights**

February 28, 2017

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# Ipsos Research Approach

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- » A4A again selected Ipsos, one of the [top polling firms](#) in the country.
- » Ipsos conducted a poll January 6-13, 2017 on behalf of Airlines for America. For the survey, a sample of 5,047 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](#), partner online panel sources, and "river" [sampling](#) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing 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 2015 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, region, race/ethnicity and income.

Source: Ipsos survey of American adults (January 2017)

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# Ipsos Poll Accuracy

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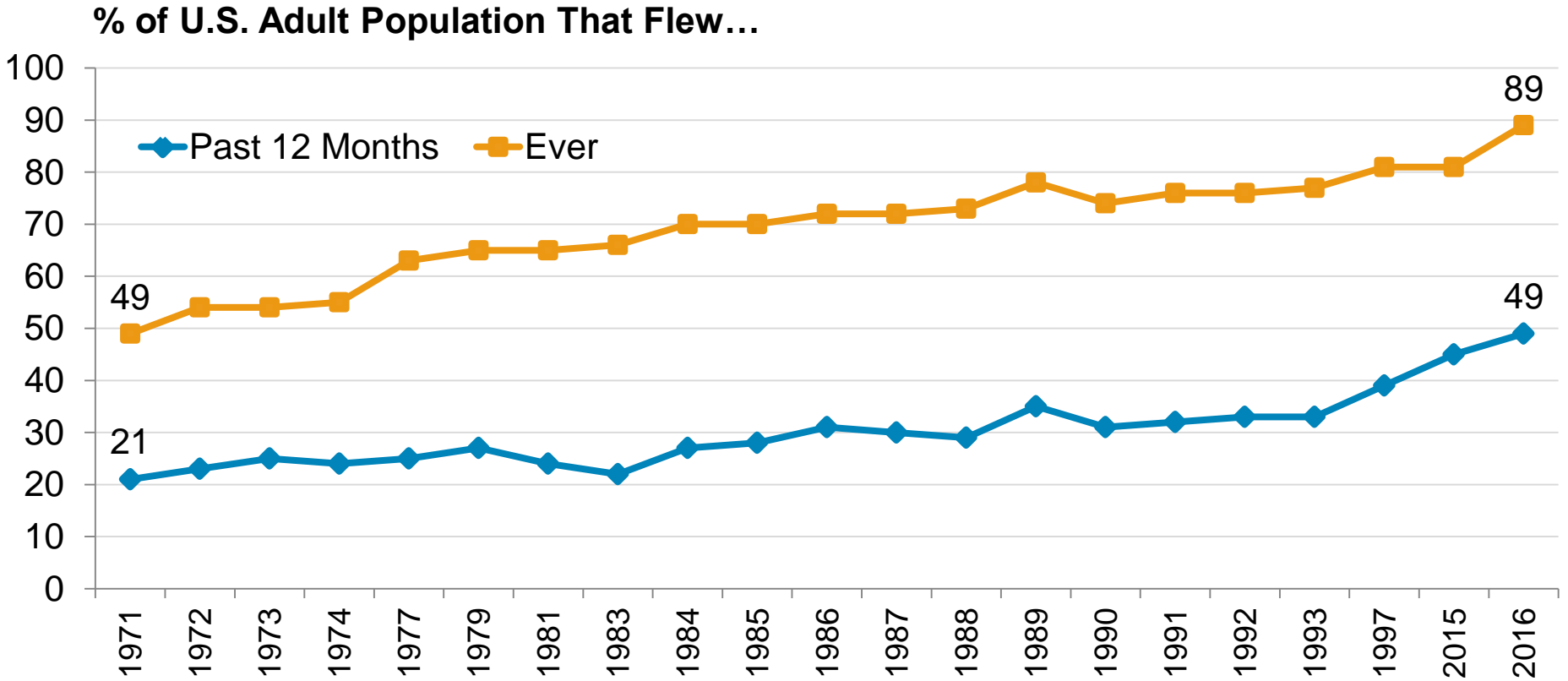
- » Statistical margins of error are not applicable to online polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding.
- » The precision of Ipsos online polls is measured using a [credibility interval](#). In this case, the poll has a credibility interval of plus or minus 1.6 percentage points for all respondents.
- » 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=5,047, DEFF=1.5, adjusted Confidence Interval=3.1).

Source: Ipsos survey of American adults (January 2017)

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# About Half the American Population Traveled by Airline in 2016

Almost 90 Percent of Americans Have Traveled by Airline in Their Lifetimes



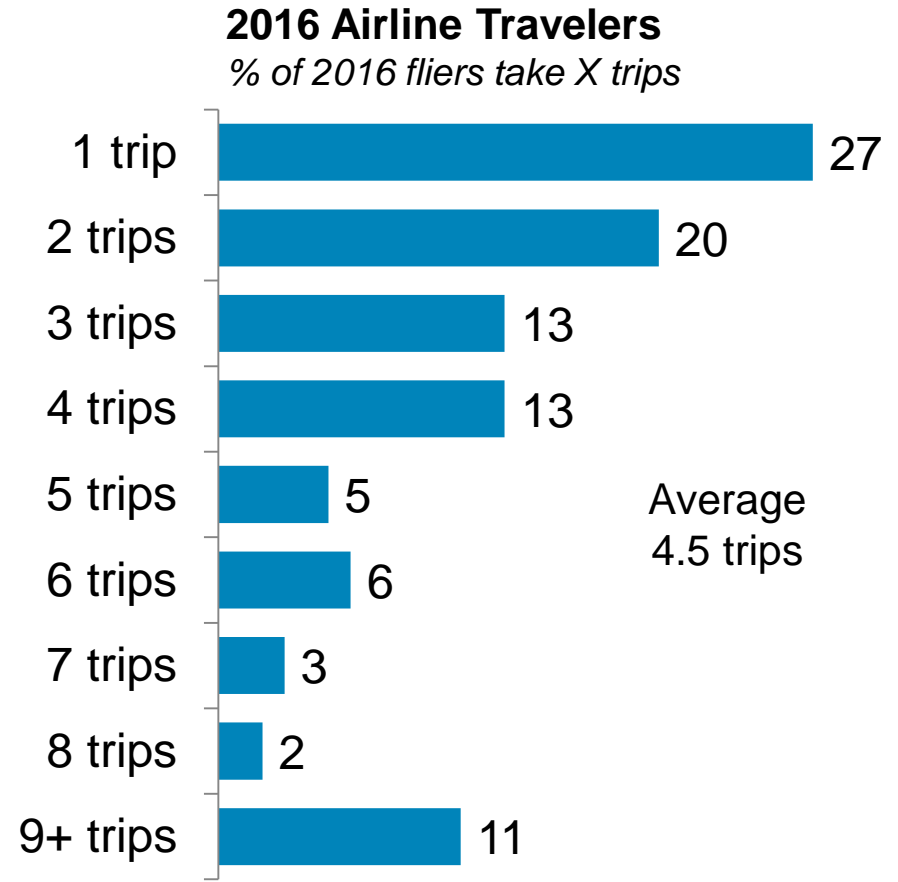
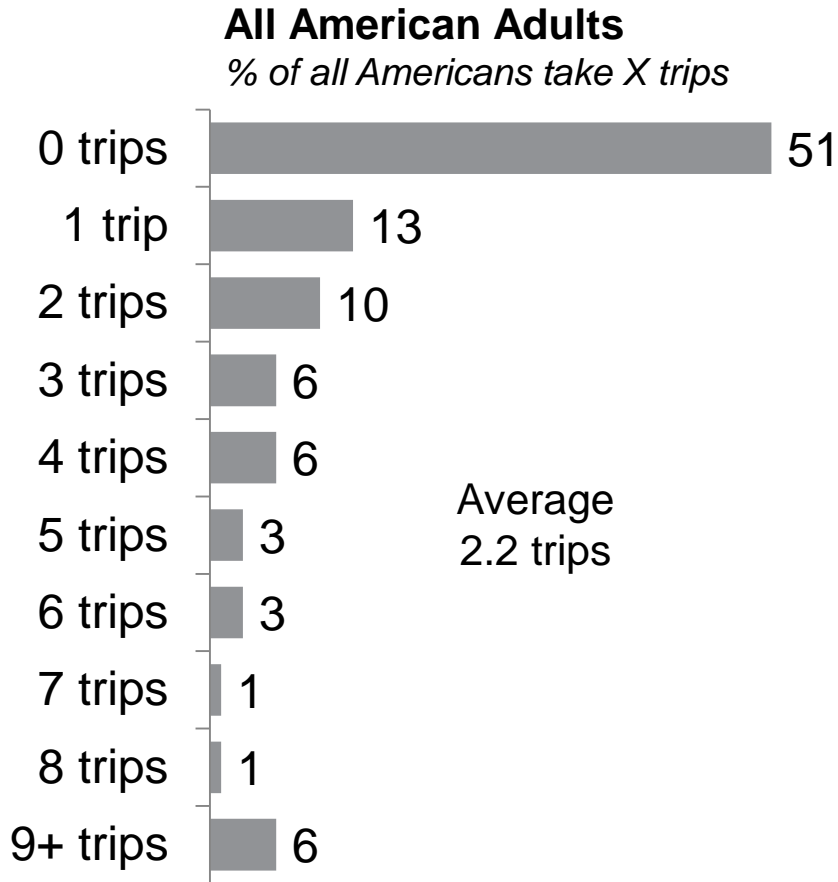
Source: Gallup and Ipsos Public Affairs



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# On Average, American Adults Took 2.2 Airline Trips in 2016; Fliers Took 4.5 Trips

## Six Percent of Americans and 11 Percent of Fliers Took Nine or More Trips

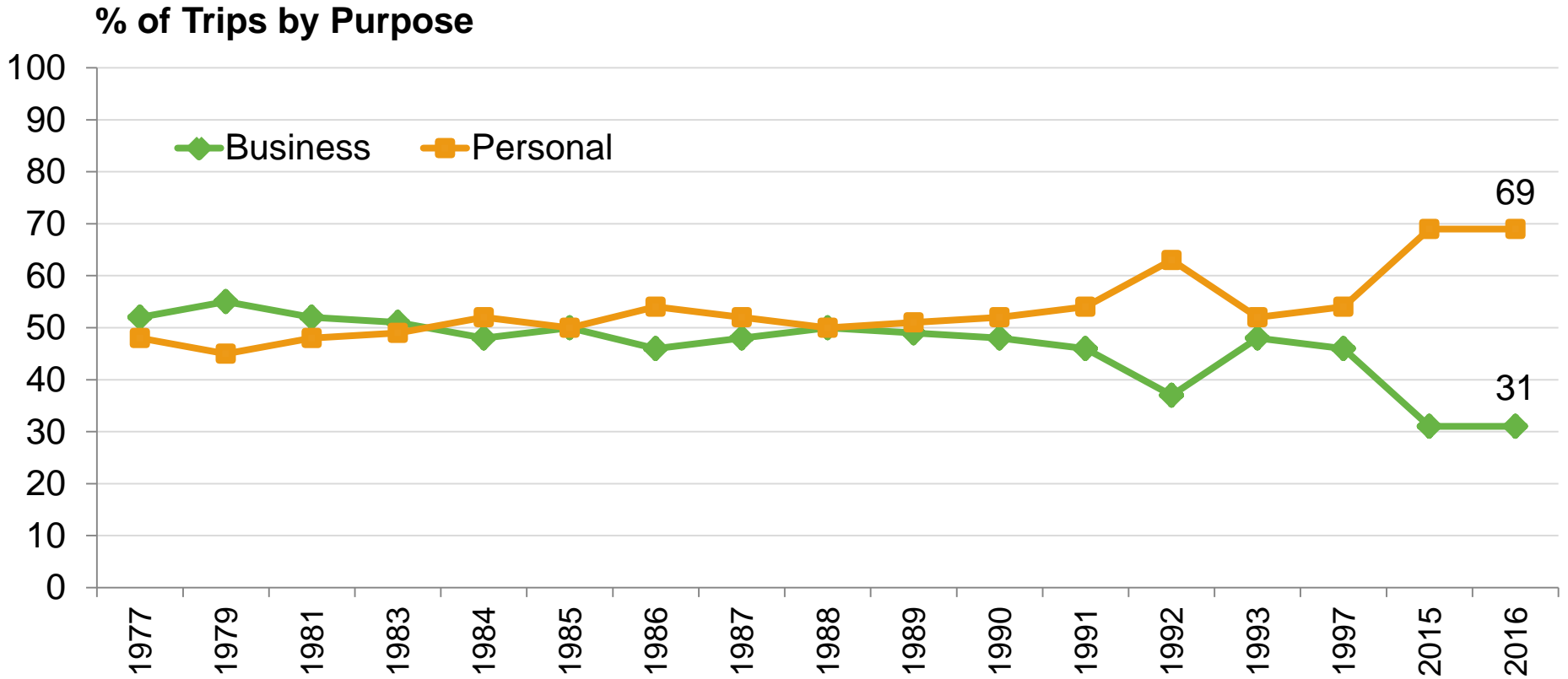


Source: Gallup and Ipsos Public Affairs



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# More Than Ever Before, Americans Are Traveling by Airline for Personal Reasons



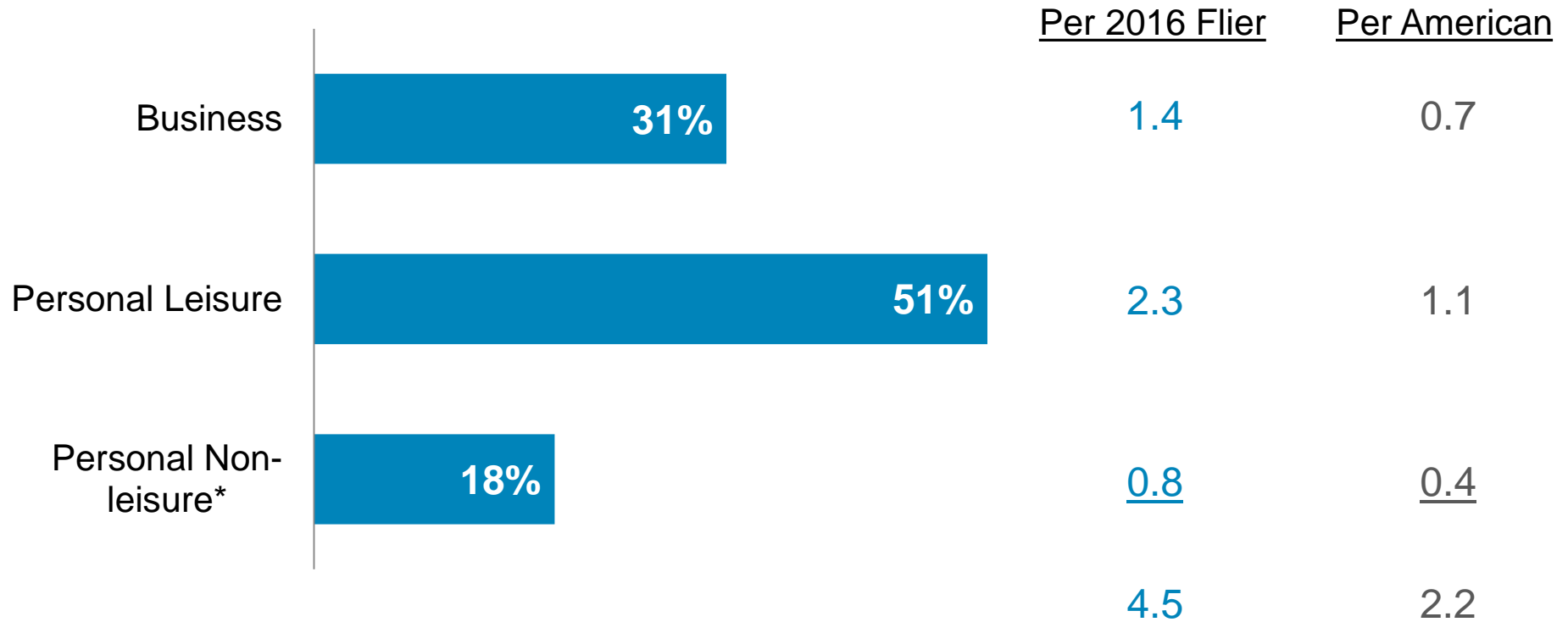
Source: Gallup and Ipsos Public Affairs



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# Half of 2016 Airline Trips Were Taken Primarily for Leisure; 31 Percent for Business

## Composition of Airline Trips Taken by Primary Purpose in 2016

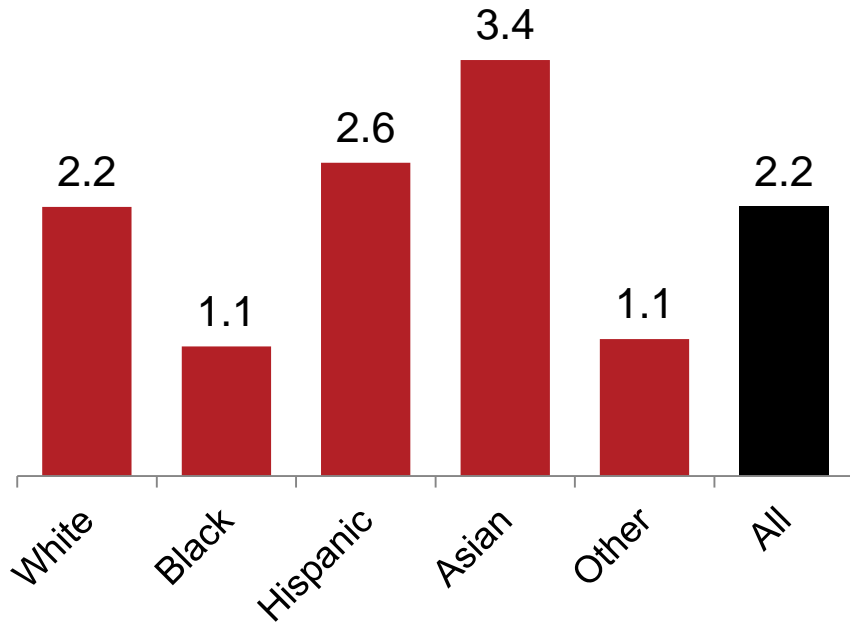


\* Includes traveling to/from college, family event, job interview, funeral, medical matters

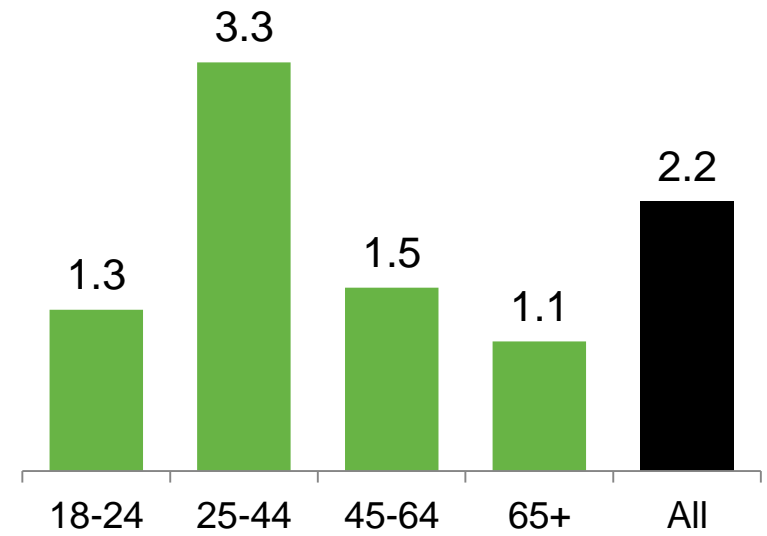


# Propensity to Fly Varies Widely by Race/Ethnicity and Age Group

## 2016 Airline Trips by Race/Ethnicity Among American Adults



## 2016 Airline Trips by Age Among American Adults



Source: Ipsos survey of American adults (January 2017)



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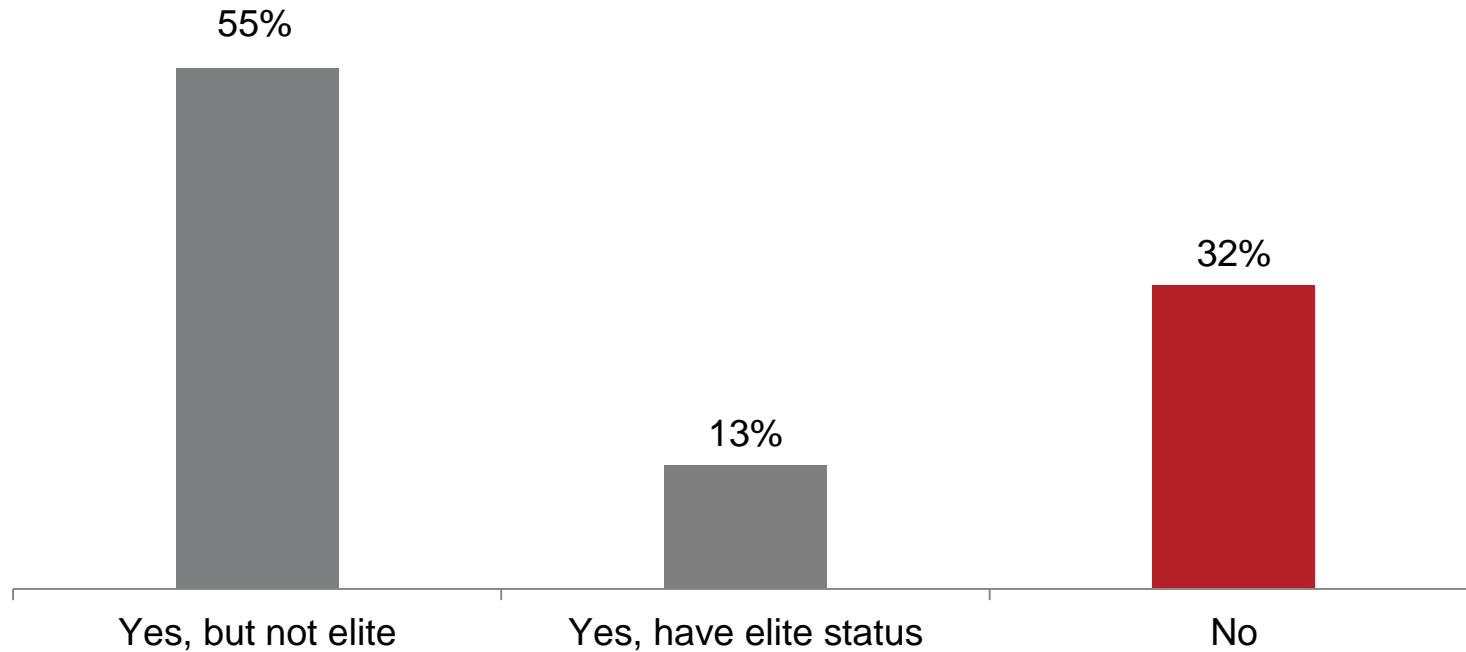


# 68 Percent of 2016 Fliers Belong to at Least One Airline Frequent Flier Program

## Only 13 Percent Reported Having Elite Status

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### Enrollment in Frequent Flier Programs



Source: Ipsos survey of American adults (January 2017)

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## When Choosing an Airline, Price Is Top Consideration Regardless of Trip Purpose

### Price and Schedule Are Most Important Criteria, Followed by Reliability and Comfort

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*When traveling for business/personal, how would you rank the following in terms of choosing which airline to fly, with 1 being your first priority and 8 being your last priority?*

Criteria	Rank	Business Score	Personal Score
Affordability (airfare / ancillaries / taxes)	1	2.89	2.40
Flight schedule (routes, timings)	2	3.21	3.32
Reliability of on-time departure and arrival	3	4.00	4.11
Airline seat comfort	4	4.34	4.34
Customer service (reservation/gate agents, flight attendants)	5	4.59	4.75
Quality of inflight amenities (food / entertainment / WiFi)	6	5.27	5.19
Airline frequent flier program (earn/redeem/upgrade/status)	7	5.56	5.61
Environmental responsibility	8	6.13	6.27

Source: Ipsos survey of American adults (January 2017)

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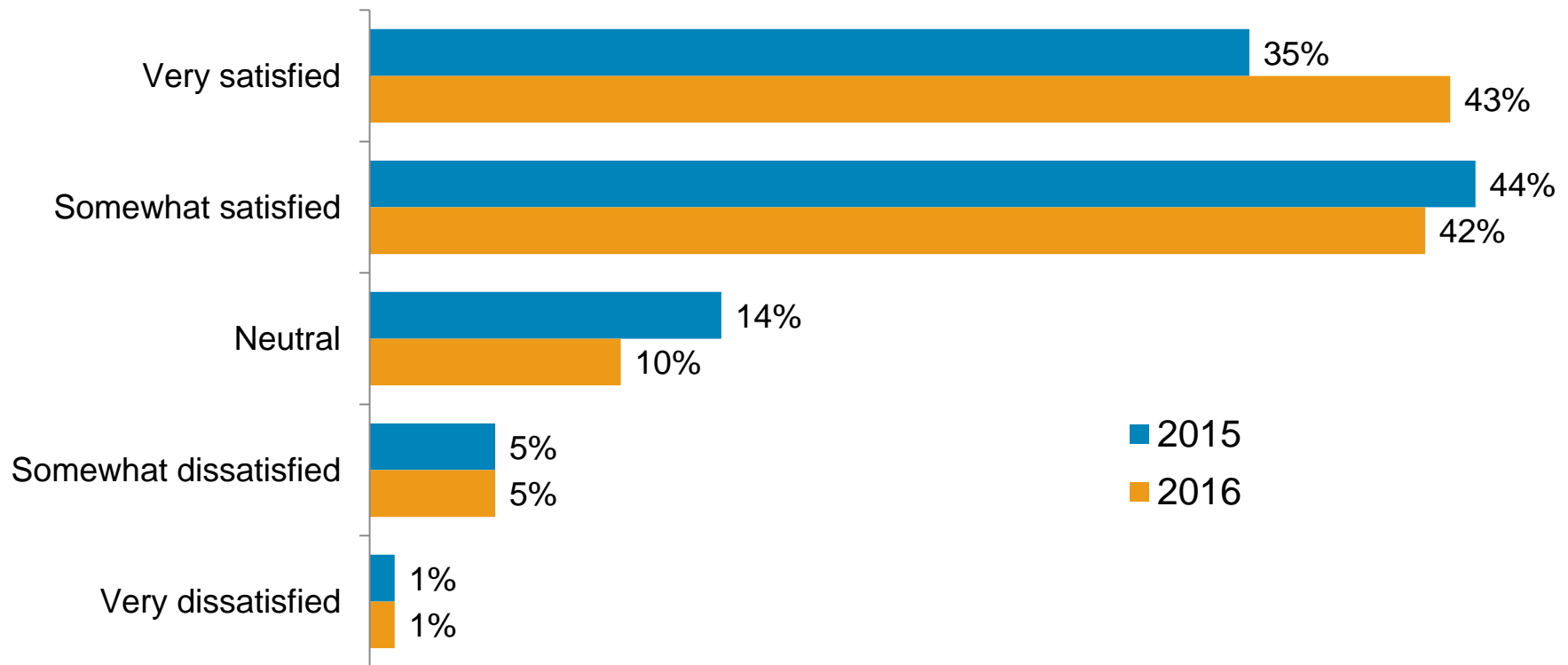
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# 85 Percent of 2016 Fliers Reported Being Somewhat or Very Satisfied

Satisfaction Up From 2015; Those Who Were “Very Dissatisfied” Unchanged at 1 Percent

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## Satisfaction with “Overall Experience With Air Travel” in 2016



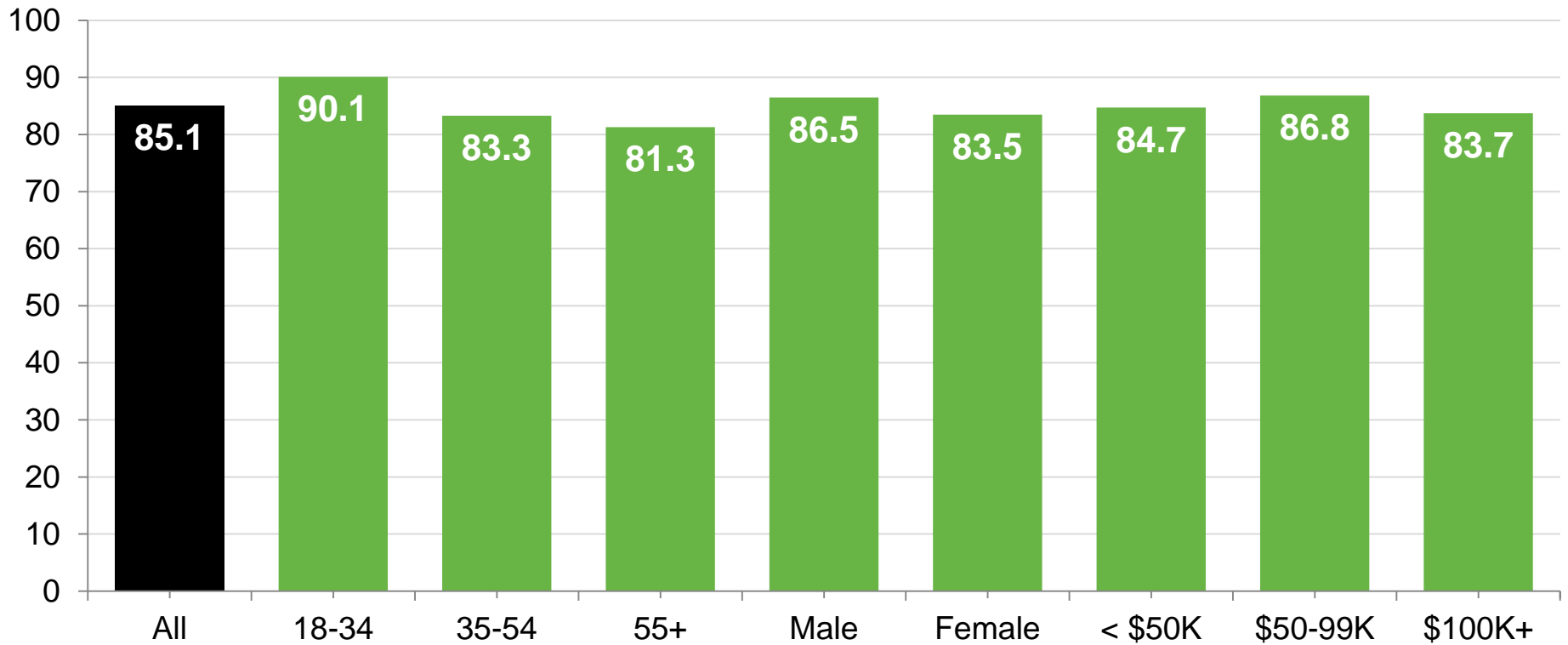
Source: Ipsos surveys of American adults (December 2015 and January 2017)

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# Those Aged 18-34 Exhibit the Highest Levels of Air Travel Satisfaction\*

Satisfaction\* % Among 2016 Fliers by Age, Gender and Household Income



Source: Ipsos survey of American adults (January 2017)

\* Somewhat or very satisfied

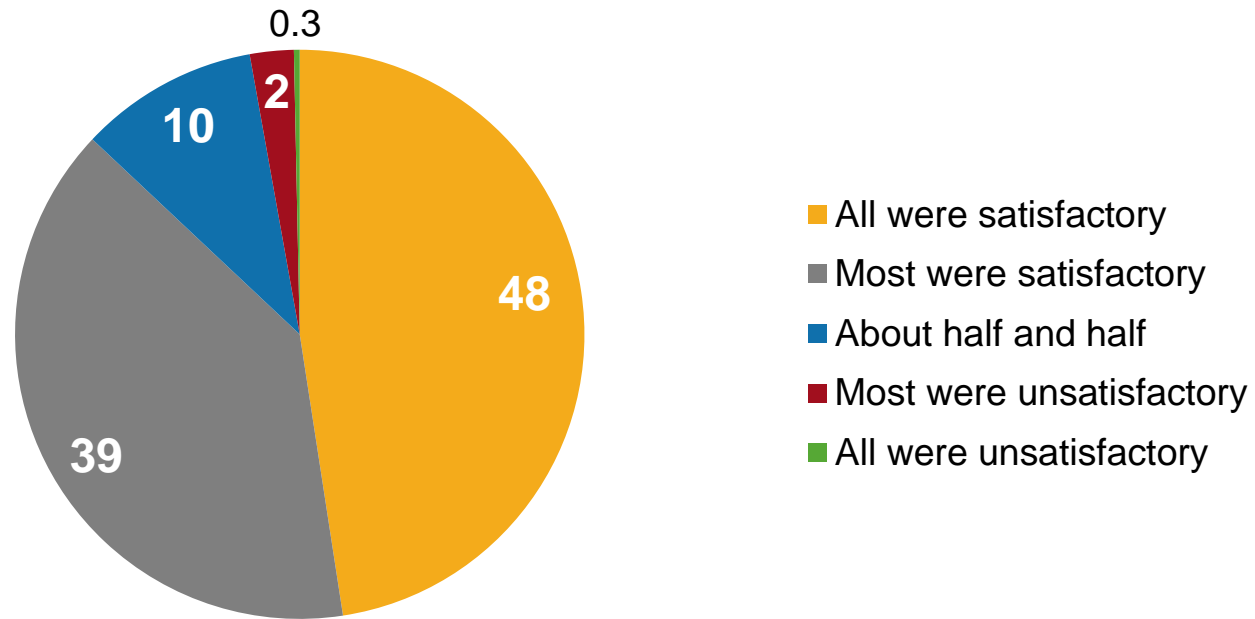


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## 48% of 2016 Fliers Said All Flights Satisfactory; 39% Said Most Were Satisfactory

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*Of all the flights you took in 2016, what amount were satisfactory to you?*



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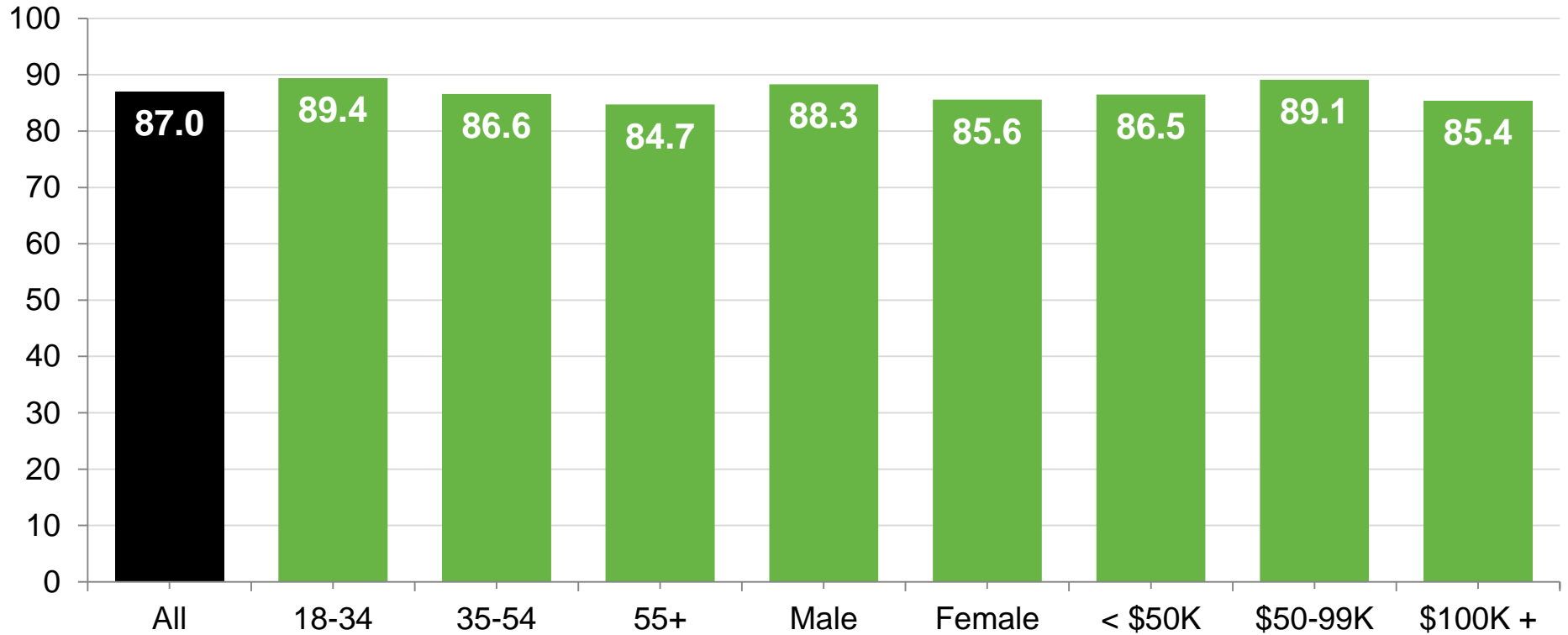
Source: Ipsos survey of American adults (January 2017)



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# Overwhelming Majority of 2016 Fliers Reported Satisfaction With Most/All Flights

% of 2016 Fliers Reporting That Most or All 2016 Flights Were Satisfactory



Source: Ipsos survey of American adults (January 2017)

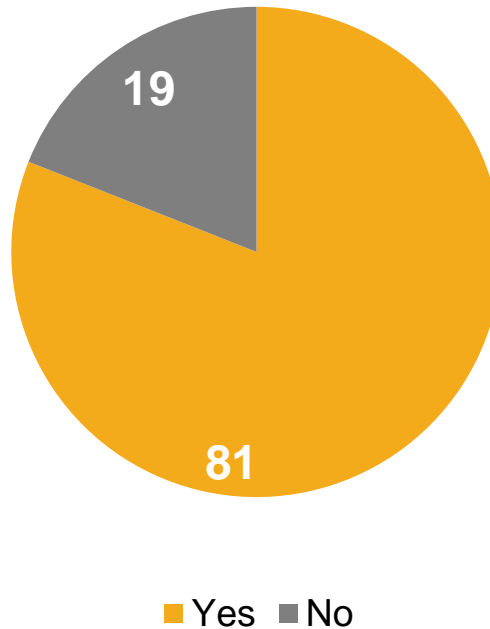


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# The Vast Majority (81%) of Complaints to U.S. Airlines Are Resolved Satisfactorily

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*In 2016, if you submitted a complaint directly to a U.S. airline, did the airline address your complaint satisfactorily?*



Source: Ipsos survey of American adults (January 2017)

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## 2016 Fliers Most Satisfied With Checking In, Followed by Shopping/Booking Flights

Fliers Gave All Six Categories an Average Score Exceeding 3

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*In 2016, on a scale of 1 (lowest) to 5 (highest), how would you rate your overall satisfaction with each of the following?*

Phase of Trip	Rank	Avg. Score (1-5)
Checking in for the flight	1	3.94
Shopping for/purchasing ticket	2	3.90
Boarding process	3	3.70
Reliability of on-time departure and arrival	4	3.69
Awaiting checked baggage upon arrival at destination	5	3.55
Getting through security	6	3.46

Source: Ipsos survey of American adults (January 2017)

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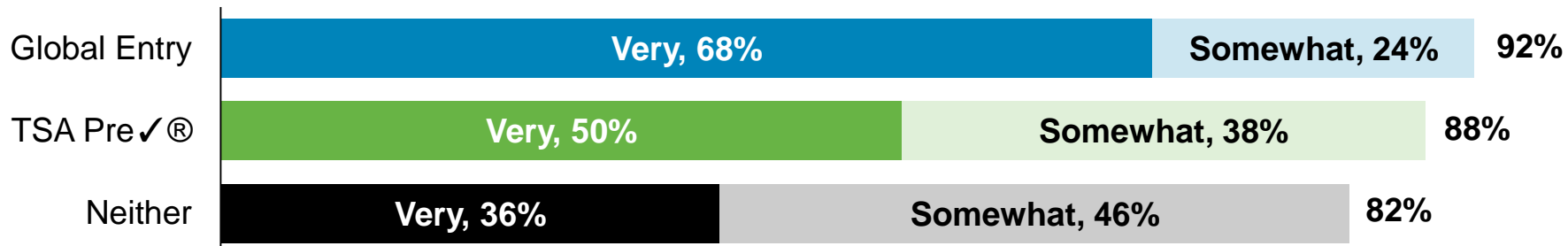
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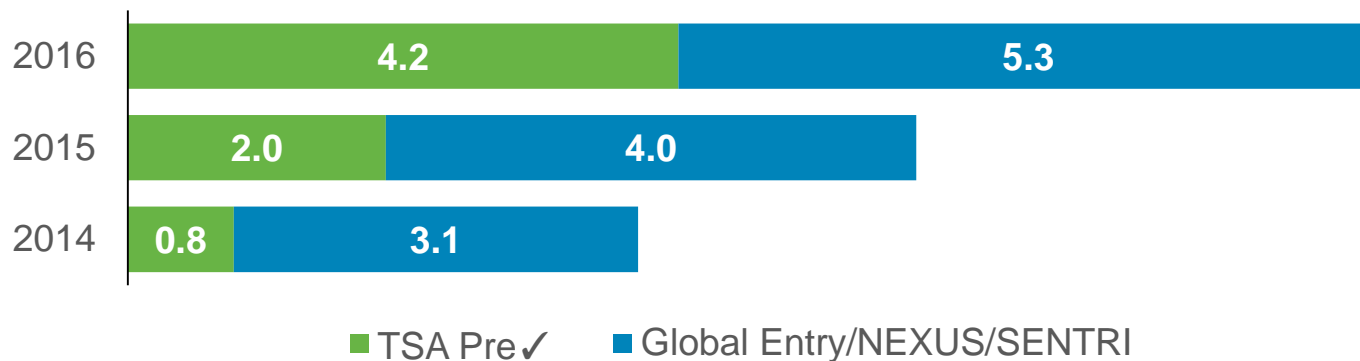
# Flier Satisfaction Rises Markedly With Enrollment in Expedited Screening Programs

## Airline/Government Collaboration Boosting Participation in DHS Trusted Traveler Programs

### % of 2016 Fliers Indicating “Very Satisfied” With Overall Air Travel Experience



### Millions of Persons Enrolled in DHS Trusted Traveler Programs (Dec. 31)



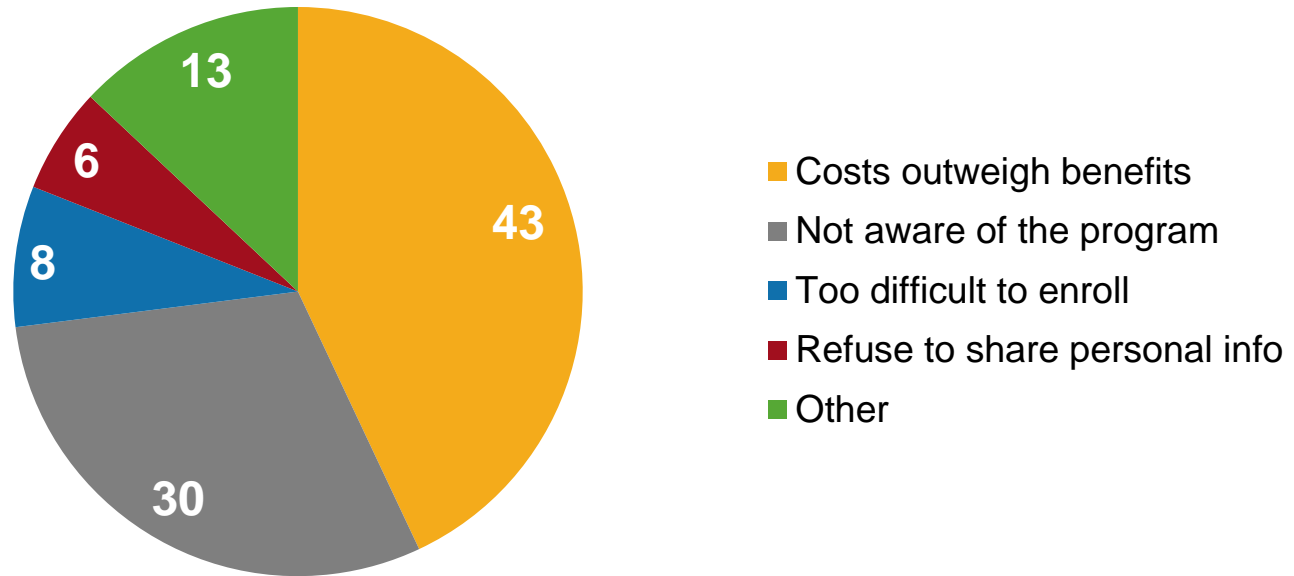
Sources: Ipsos survey of American adults (January 2017), Transportation Security Administration, Customs and Border Protection



## Among 2016 Fliers, Cost Is Biggest Barrier to Enrollment in Expedited Screening But 30% of Respondents Claim to Be Unaware of Either TSA Pre✓® or CBP Global Entry

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*What is the primary reason you are not enrolled in either of these expedited screening programs?*



Source: Ipsos survey of American adults (January 2017)

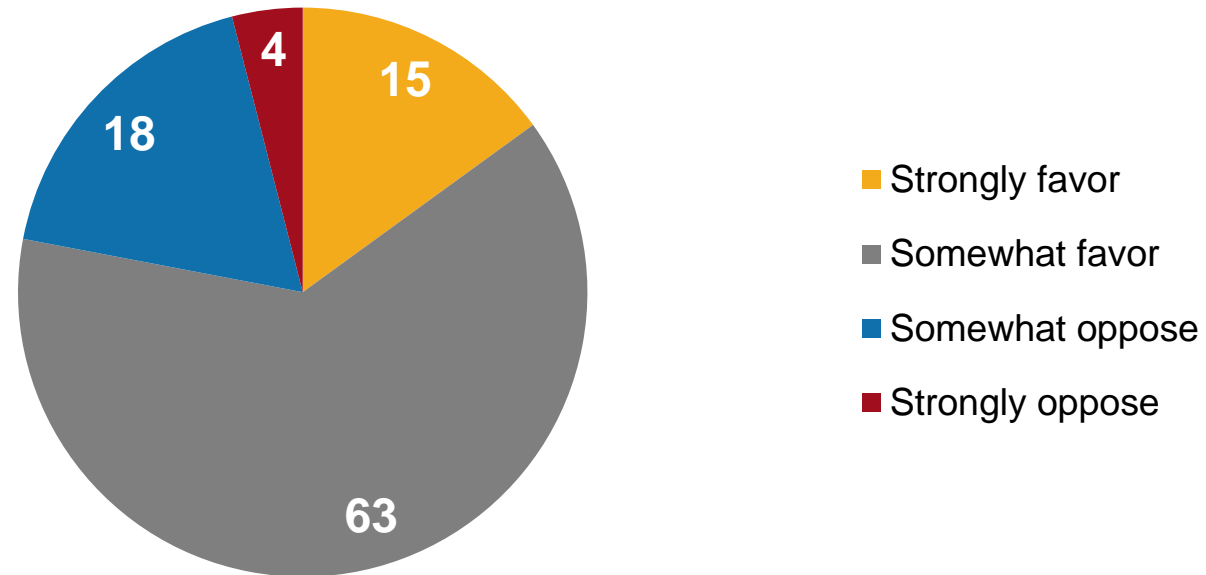
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## 78% of Americans Support Separation of Air Traffic Control (ATC) Operations and Safety As Long As Federal Government Continues to Oversee/Regulate Safety

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*Some have proposed that an effective way to modernize the air traffic control system would be to transfer day-to-day operations to an independent non-profit with continued federal regulatory oversight of safety. Such an approach would be more in line with international best practices. Do you favor or oppose such a plan?*



Source: Ipsos survey of American adults (January 2017)

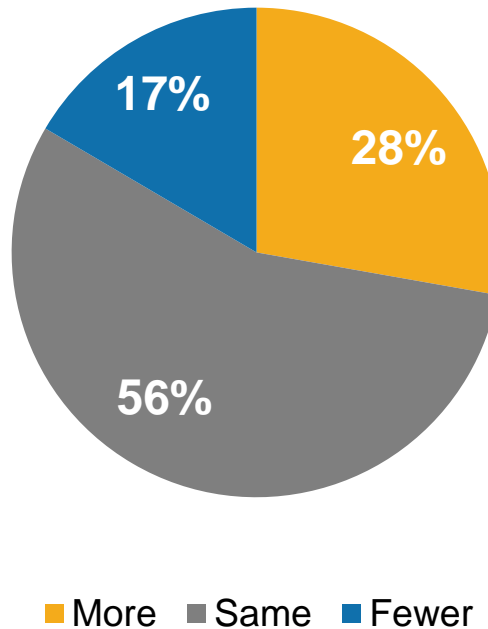
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## Most Americans Will Fly as Much or More in 2017 as They Did in 2016

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*Including both business travel and personal travel, do you think you will take more or fewer airline trips in 2017 than you did in 2016?*



Source: Ipsos survey of American adults (January 2017)

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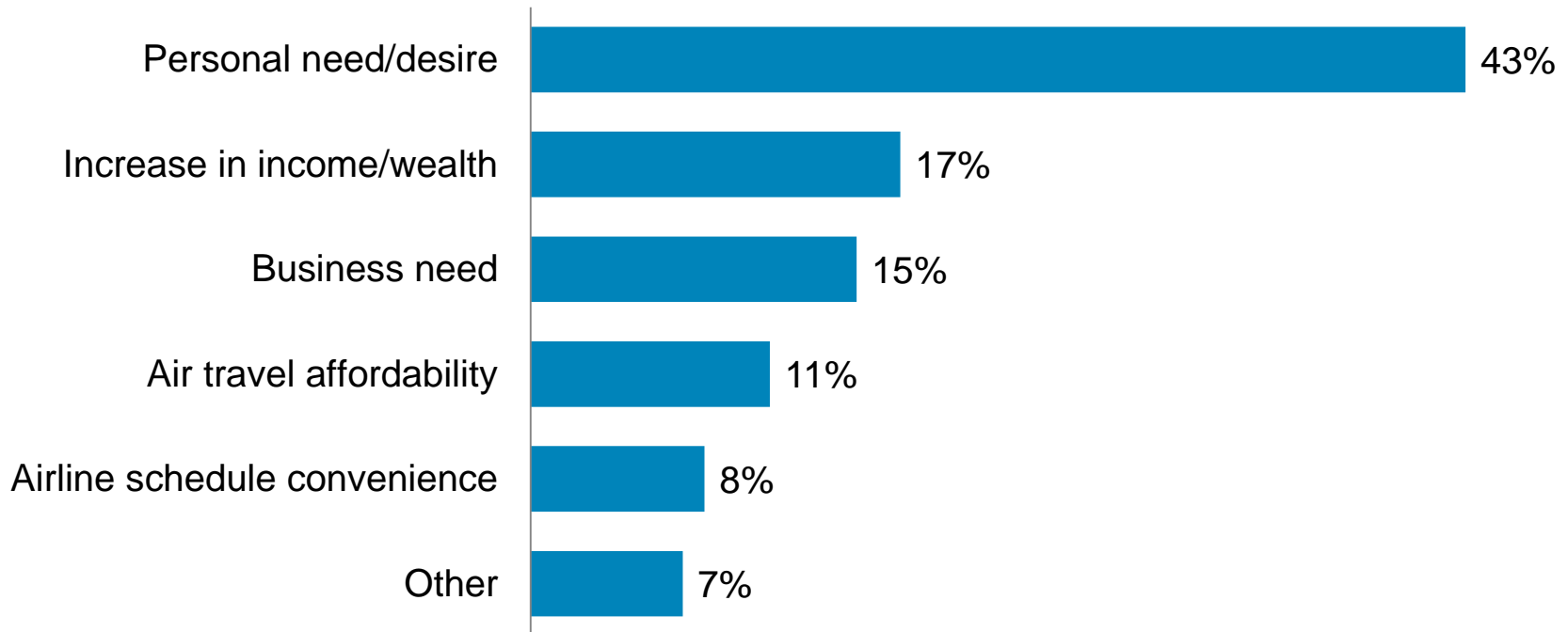


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# Those Who Plan to Fly More in 2017 Cited Personal Need/Desire as Primary Factor

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What is the **primary** factor that will result in **more** air travel in 2017?



Source: Ipsos survey of American adults (January 2017)

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