



Airlines for America[®]

We Connect the World

Air Travelers in America

Key Findings of a Survey Conducted by Ipsos

2021

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

For more information on this study, please contact:

Chris Jackson
Vice President, US
Public Affairs

+1 202 420-2025

chris.jackson@ipsos.com

Jennifer Berg
Director, US
Public Affairs

+1 773 251-0171

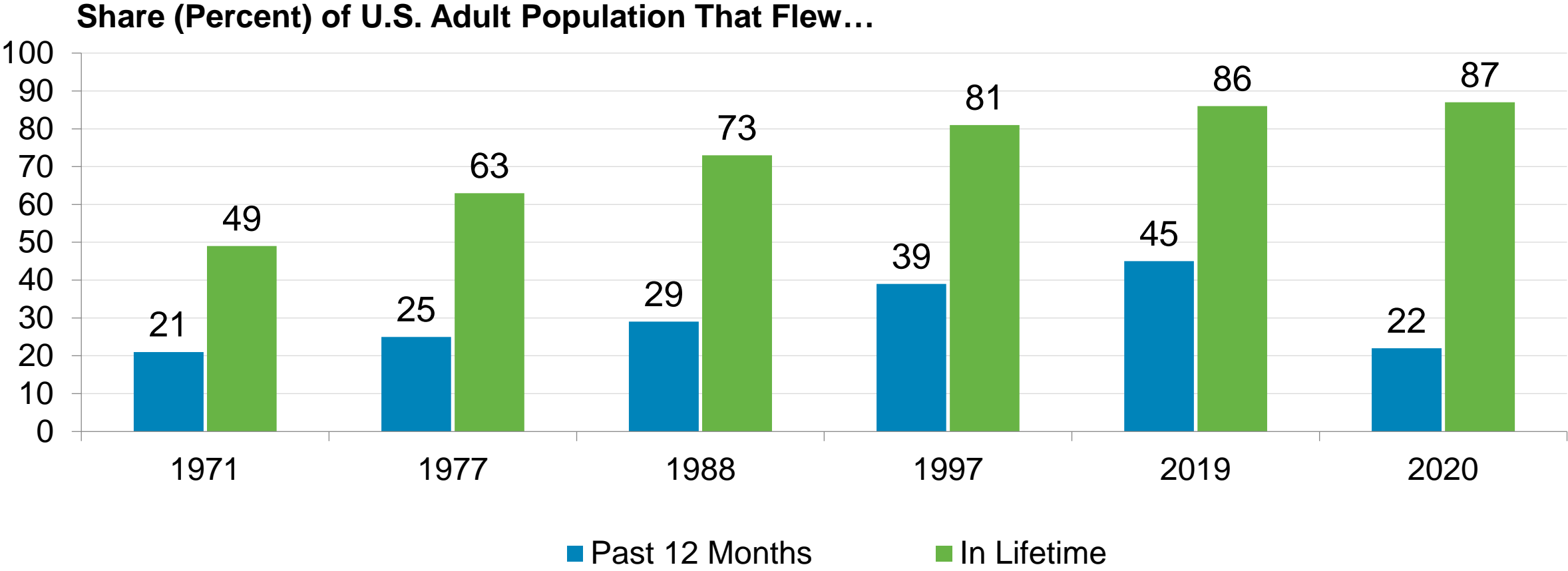
jennifer.berg@ipsos.com

Ipsos Research Approach and Poll Accuracy

- » These are some of the findings of an [Ipsos](#) poll conducted between January 7-21, 2021, on behalf of [Airlines for America](#). For this survey, a sample of roughly 10,049 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English. This includes 1,995 adults who flew on an airline in 2020.
- » The sample for this study was randomly drawn from Ipsos's online panel (see link below for more info on "Access Panels and Recruitment"), partner online panel sources, and "river" sampling (see link below for more info on the Ipsos "Ampario Overview" sample method) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a 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 2016 [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, race/ethnicity, region, and education.
- » Statistical margins of error are not applicable to online non-probability 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 1.1 percentage points for all respondents, and plus or minus 2.5 percentage points for 2020 flyers. 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=10,049, DEFF=1.5, adjusted Confidence Interval=+/-2.6 percentage points).

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

87% of the U.S. Population Has Flown Commercially

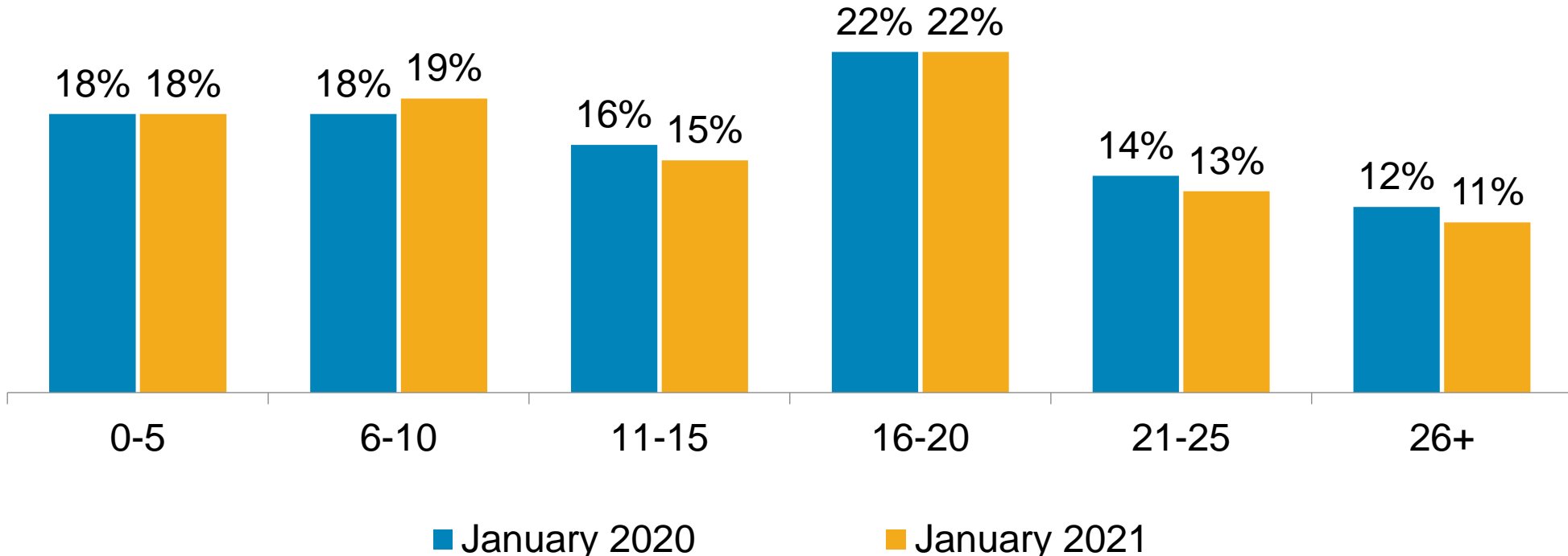


Sources: Gallup and Ipsos

More Than Half of Americans Report Having Flown Before Their 16th Birthday

Three Out of Four Flew Prior to Age 21

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

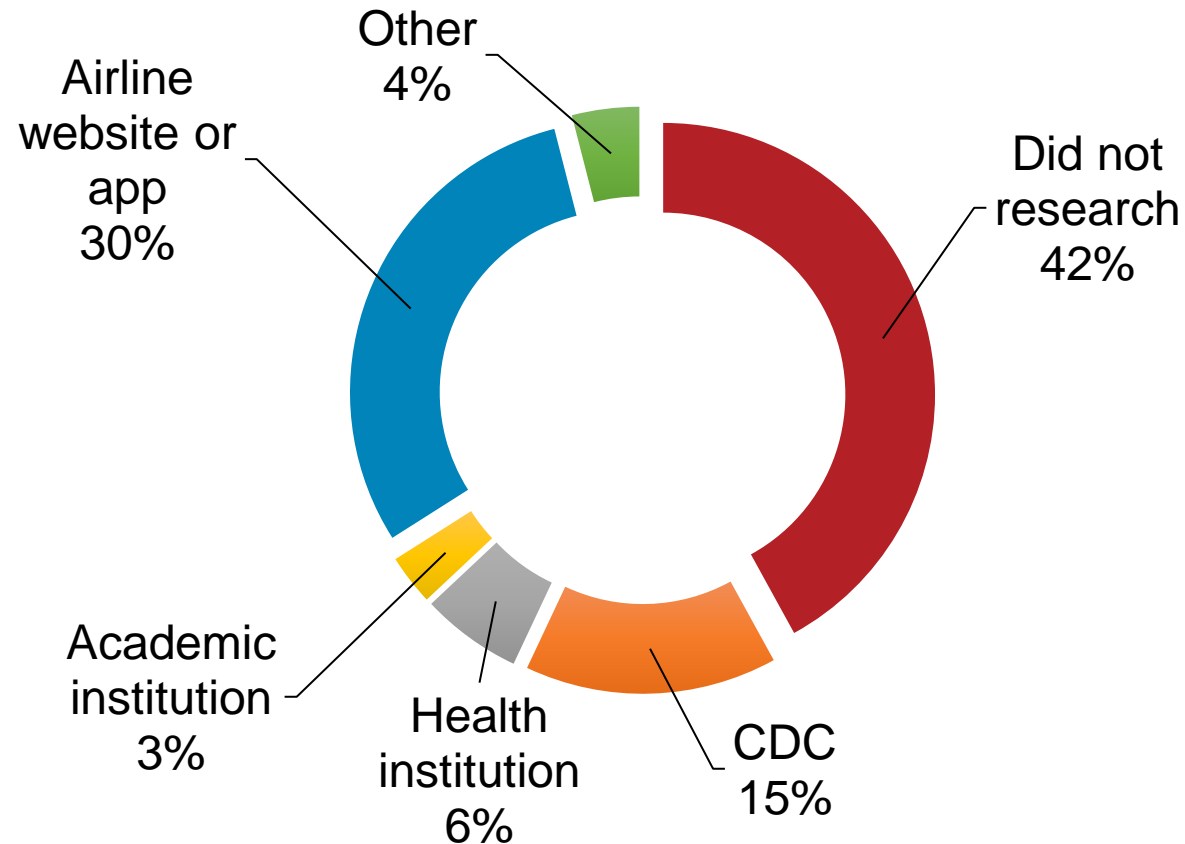


Source: Ipsos survey of American adults (January 2021)

58% of 2020 Flyers Researched COVID-19 Prior to Traveling

About Half of Those Flyers Relied on Information Provided Directly by Airlines

Before going on a trip in 2020, did you research COVID-19 as it relates to your flight and, if so, where did you go for that information?

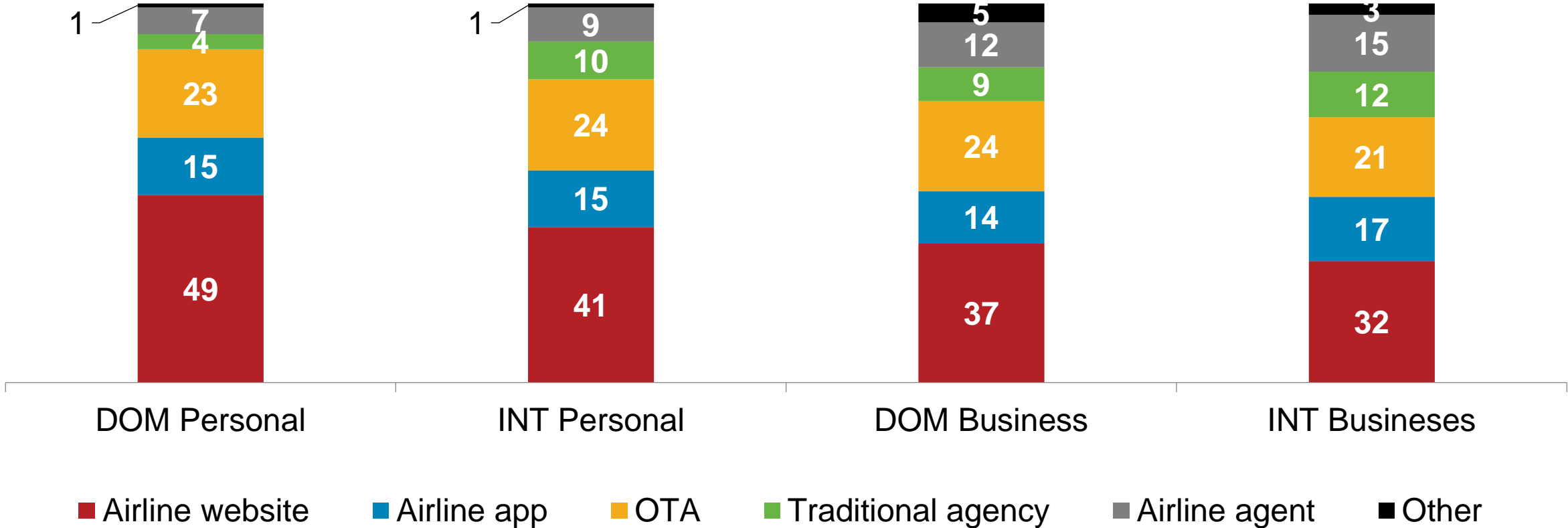


Source: Ipsos survey of American adults (January 2021)

About 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: Ipsos survey of American adults (January 2021)

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

About Half of Respondents 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?

2020 Flyers	Overall Rank	Mean Score
Ticket price/value	1	2.13
Nonstop flight option (vs. connecting)	2	2.65
Departure/arrival time	3	2.67
Percentage of seats that are occupied	4	4.20
Availability/quality of inflight WiFi/entertainment	5	4.60
Availability/quality of food/beverage service	6	4.74

Source: Ipsos survey of American adults (January 2021)

Only Half of Flyers Know That the Advertised Fare *Includes* Government-Imposed Taxes/Fees

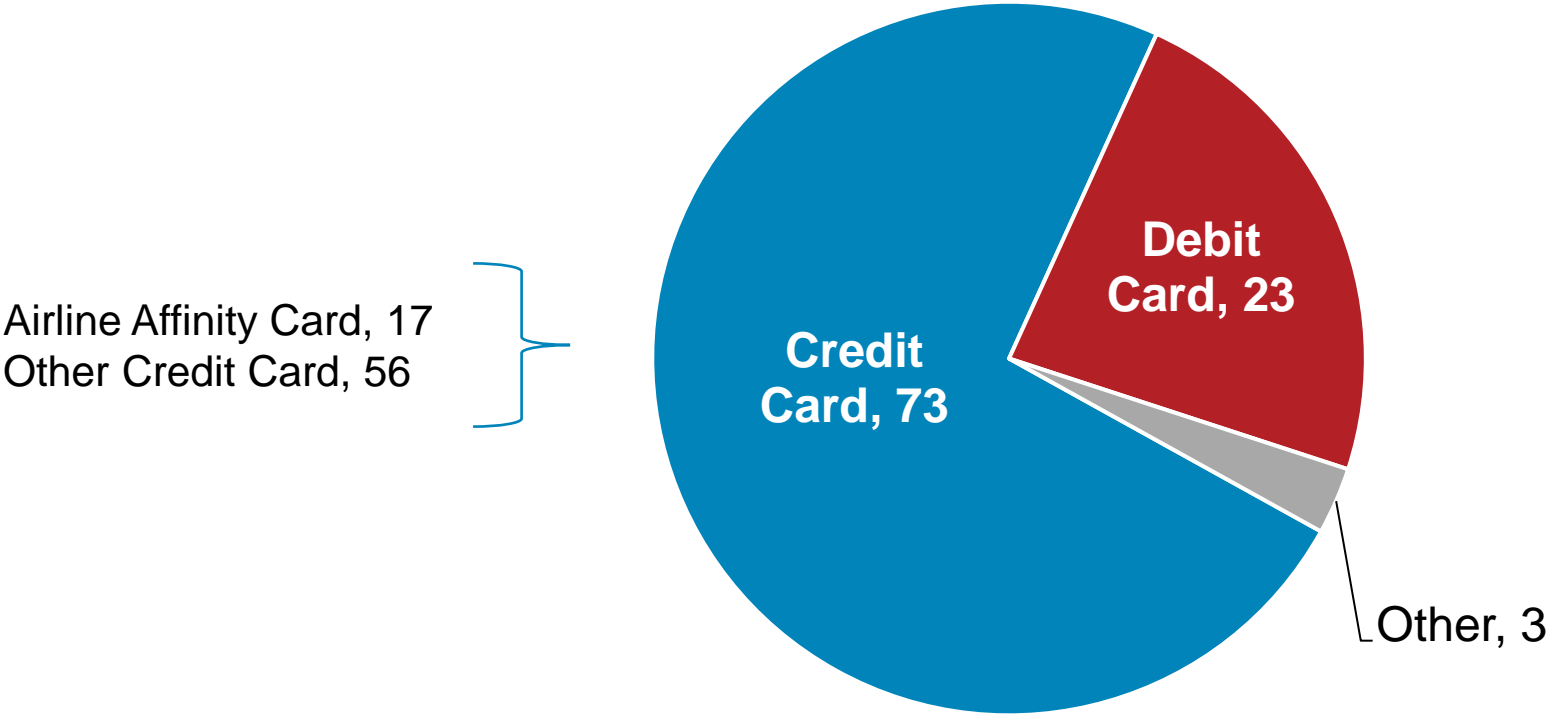
In the search results, when you see the advertised prices for each flight, which of the following statements do you think is correct?

Statement	2019 Flyers (N=4,064)	2020 Flyers (N=1,955)
The advertised price includes government-imposed taxes and fees	49%	52%
The advertised price does not include government-imposed taxes and fees	51%	48%

Source: Ipsos survey of American adults (January 2021)

Three Out of Four Personal Travelers Typically Use a Credit Card to Purchase Airline Tickets

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

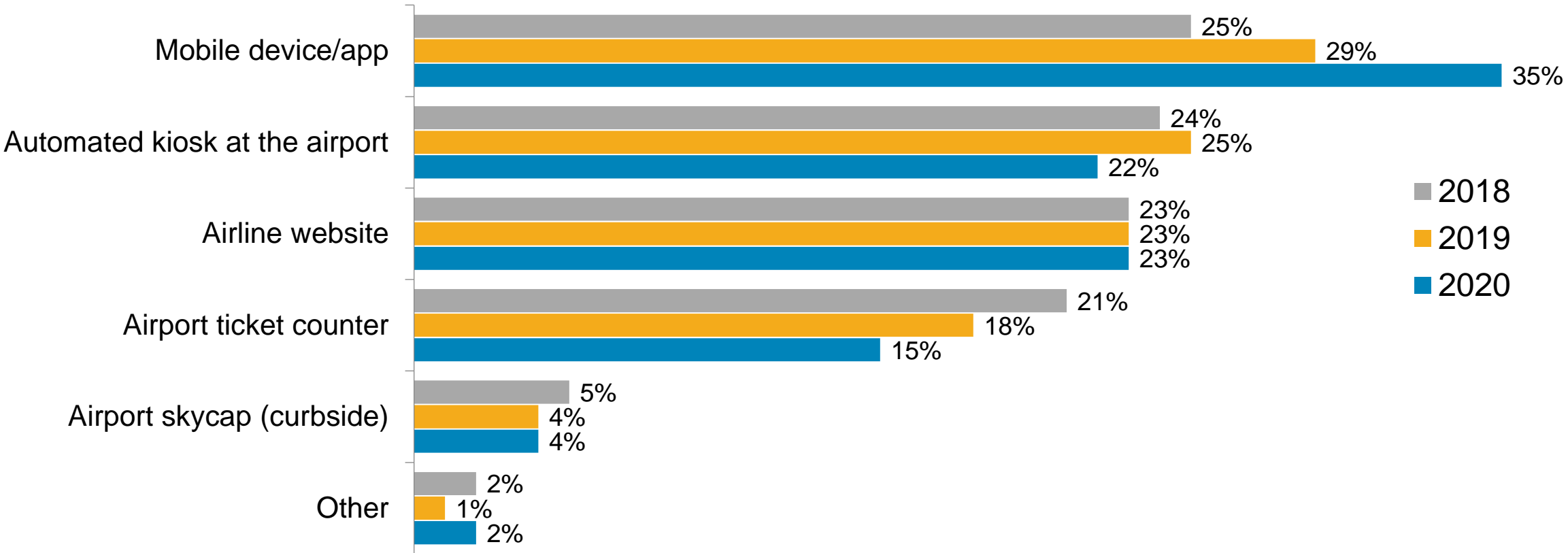


Source: Ipsos survey of American adults (January 2021)

More Flyers Are Using Mobile Apps to Check in for Flights

Among Those Not Checking Bags, 80% Checked in Electronically (App/Kiosk/Website)

When NOT checking a bag, how did you most commonly check in for trips?

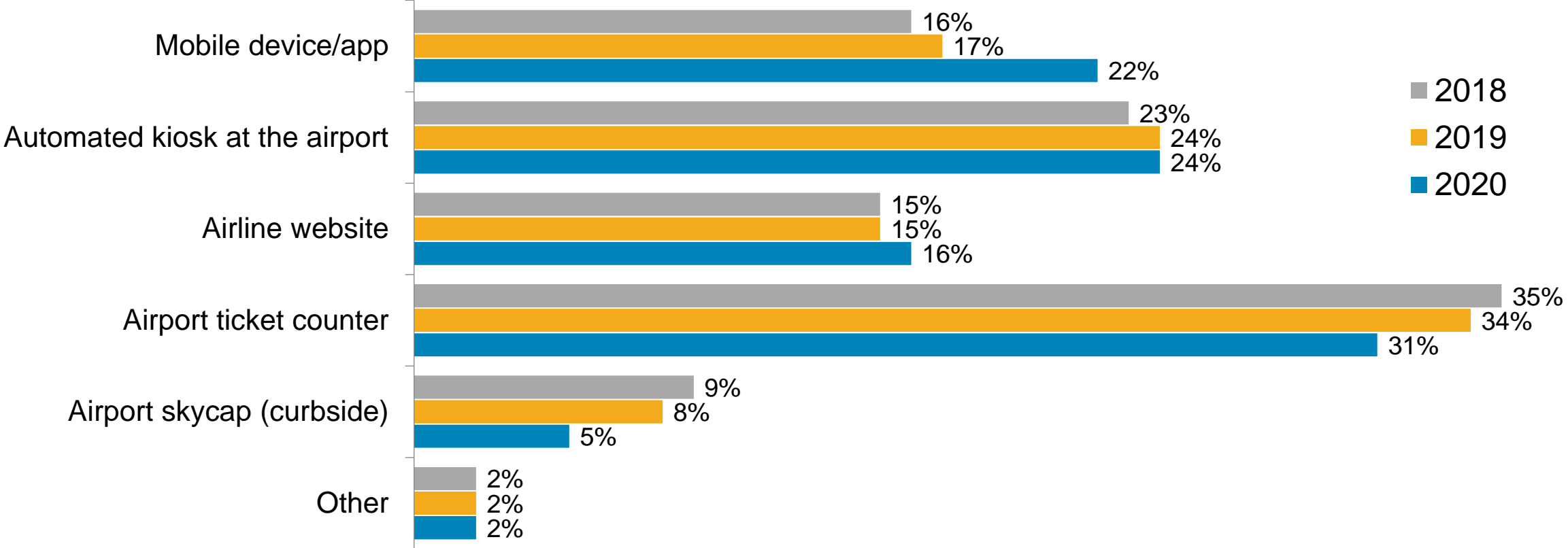


Source: Ipsos survey of American adults (January 2021)

More Flyers Are Using Mobile Apps to Check in for Flights

Among Those Checking Bags, 62% Checked in Electronically (App/Kiosk/Website)

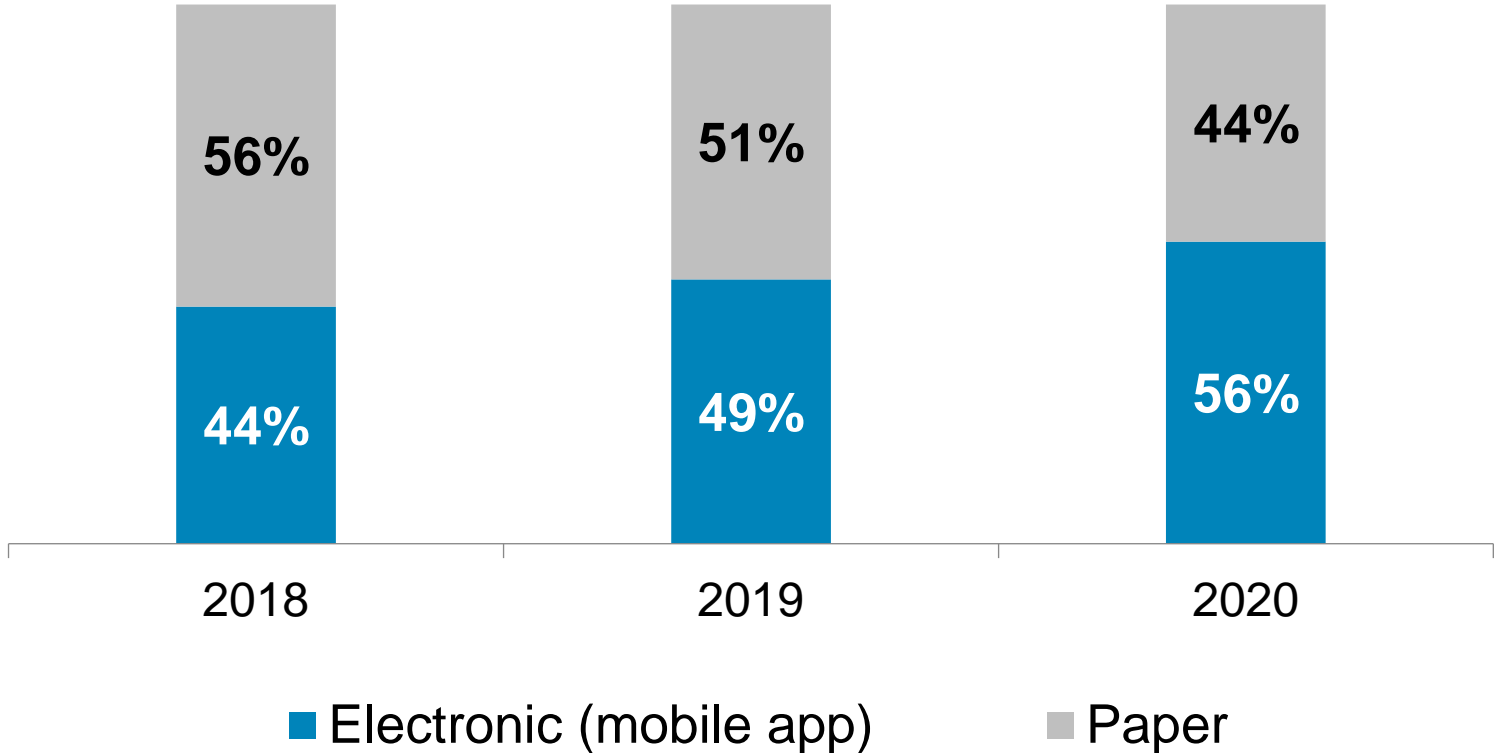
When checking a bag, how did you most commonly check in for trips?



Source: Ipsos survey of American adults (January 2021)

Flyers Are Increasingly Comfortable Using Their Mobile Devices to Board the Aircraft

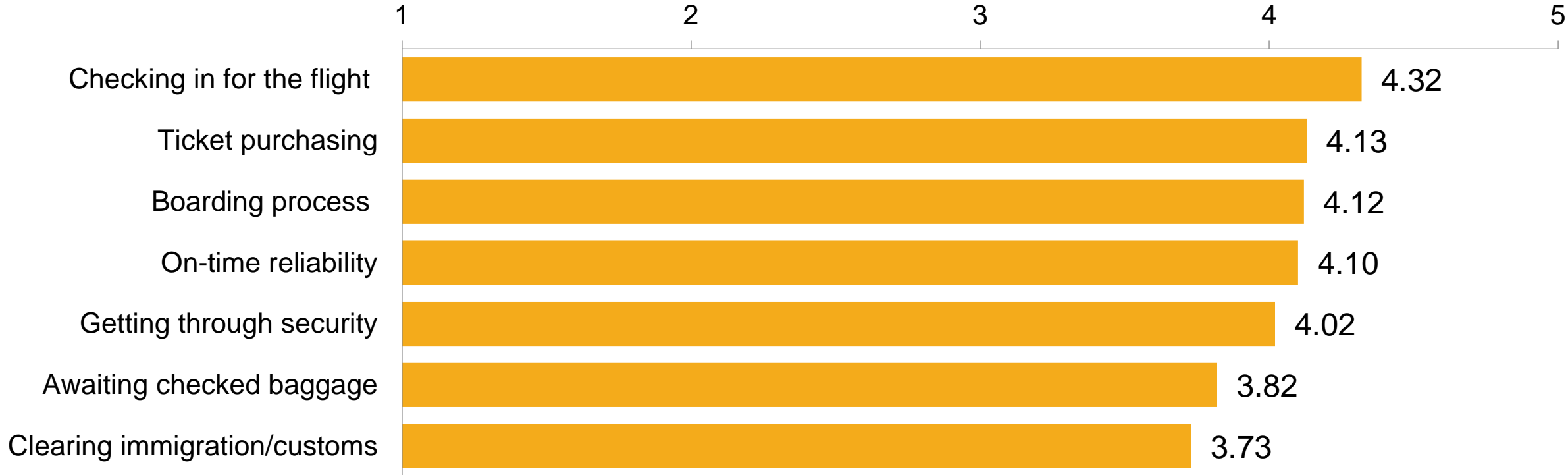
At the gate, which type of boarding pass do you typically use?



Source: Ipsos survey of American adults (January 2021)

Flyers Give Highest Marks to Check-In and Shopping/Purchasing Experience

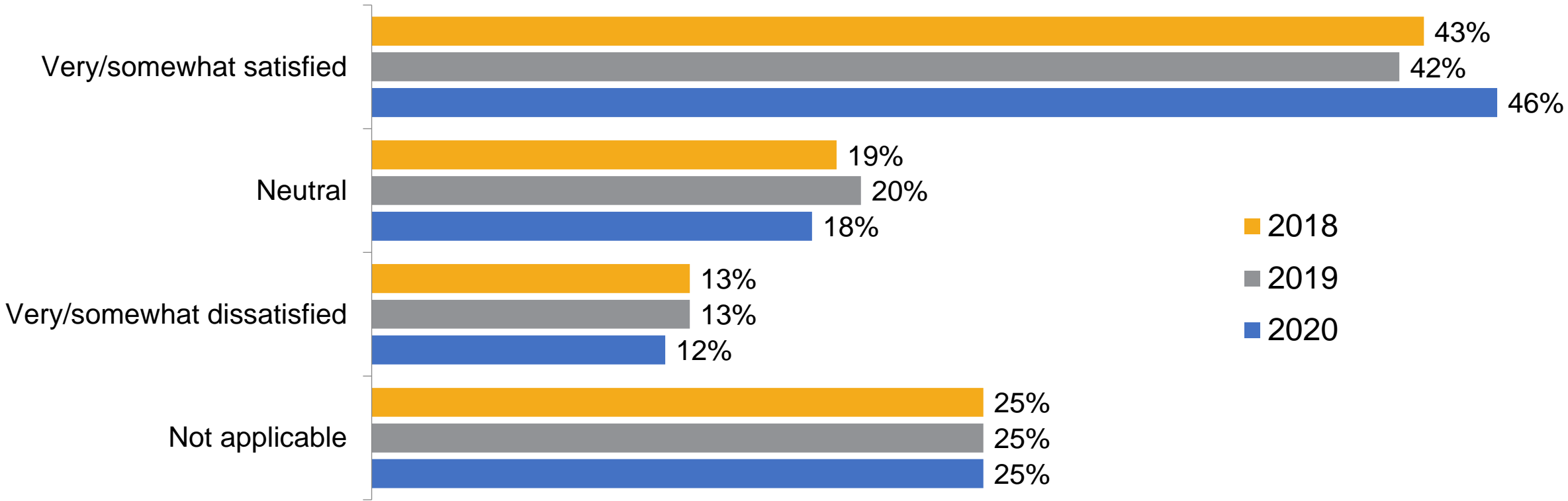
On a scale of 1 (very dissatisfied) to 5 (very satisfied), how would you rate your overall satisfaction with each of the following?



Source: Ipsos survey of American adults (January 2021)

Flyer Satisfaction With Airline Response to Irregular Operations Edged Up in 2020

How would you rate your overall experience with customer service / rebooking / communication when your flight is canceled or significantly delayed?

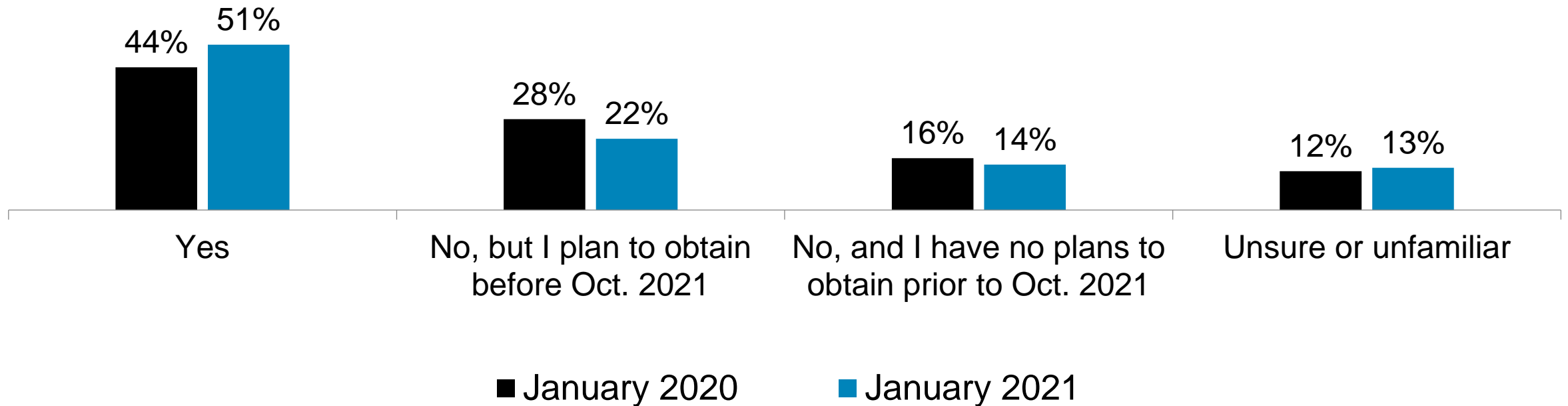


Source: Ipsos survey of American adults

51% of Americans Claim to Be REAL ID-Compliant as of January 2021

An Additional 22% Intend to Be Compliant by October 2021

Beginning October 2021, the only state-issued driver's license or ID that will be valid as identification for TSA will be a "REAL ID" license. A valid passport and other selected federal forms of identity will also still be accepted as proof of identity in order to board commercial aircraft. Is your driver's license or other state-issued ID a REAL ID?

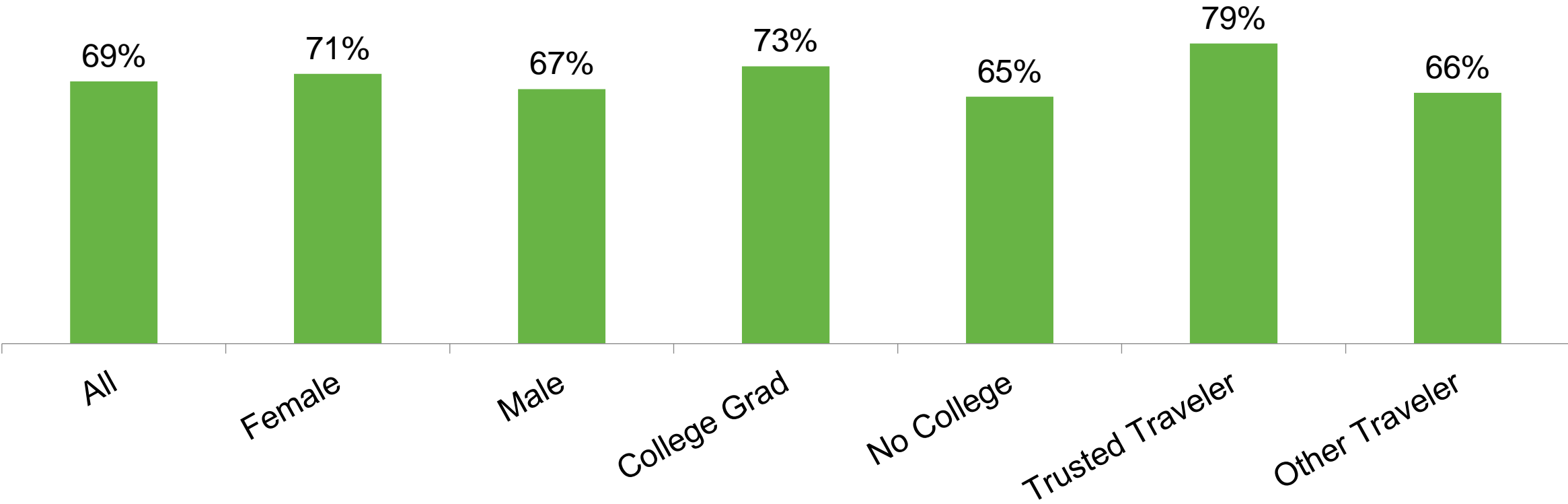


Source: Ipsos survey of American adults (January 2021)

69% of Population Values Airline Commitments to Environmentally Friendly Operations

79% of Those Enrolled in Global Entry or TSA Pre-Check Value Environmental Commitments

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)?

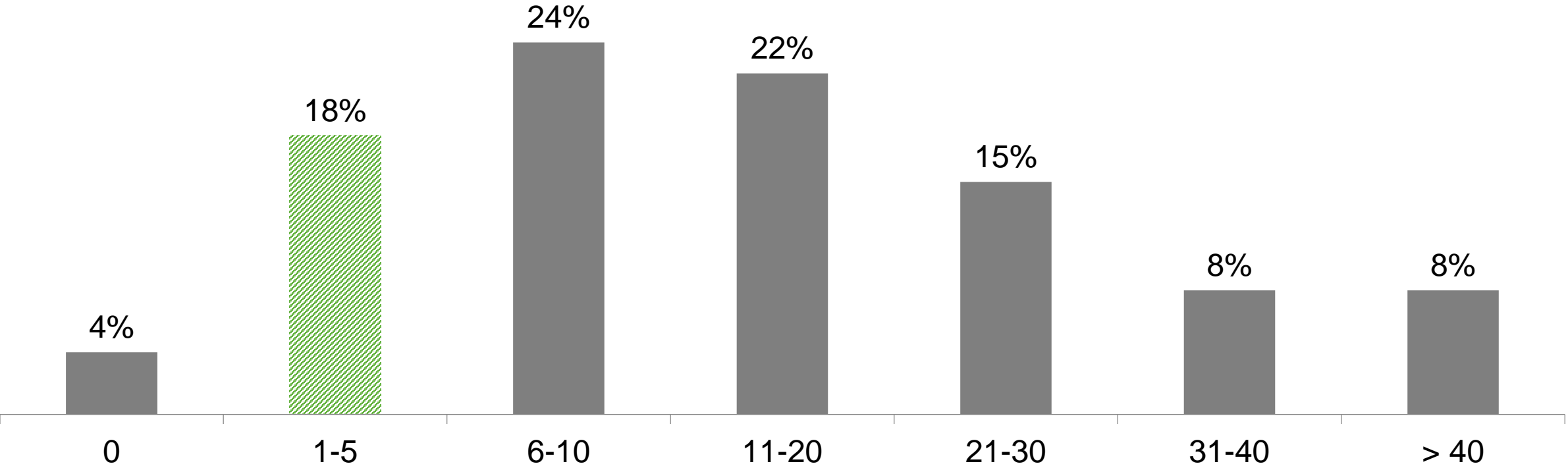


Source: Ipsos survey of American adults (January 2021)

Over Half of Americans Think Airlines Are Responsible for > 10 Percent 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 (January 2021)



Airlines for America[®]

We Connect the World