



Airlines for America[®]

We Connect the World

Air Travelers in America

Key Findings of a Survey Conducted by Ipsos

March 2025

Contents

- » Ipsos Description, Research Approach and Poll Accuracy
- » Access to Air Travel Over Time
- » Propensity to Fly by Age Group and Household Income
- » Air Traveler Behavior and Experience
 - » Use of Different Types of Airlines
 - » Trip Purpose, Duration and Bag Checking
 - » Determinants of Flight Choice and Vacation Destination
 - » Researching Flight Options and Purchasing Tickets
 - » Checking in for Flights and Boarding Aircraft
 - » Overall Satisfaction
- » Priorities for Future Improvements
- » Environmental Sustainability

About Ipsos

- Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 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

For more information on this study, please contact:

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

Ipsos Research Approach and Poll Accuracy

These are some of the findings of an Ipsos poll conducted between **January 7-22, 2025**, on behalf of Airlines for America®. This poll screened a **national sample of 3,667 American adults** (age 18 or older) to identify those who have “ever flown on an airplane” via the probability-based **Ipsos KnowledgePanel®** (“KP”). Of these, 3,230 respondents qualified for and completed the survey.

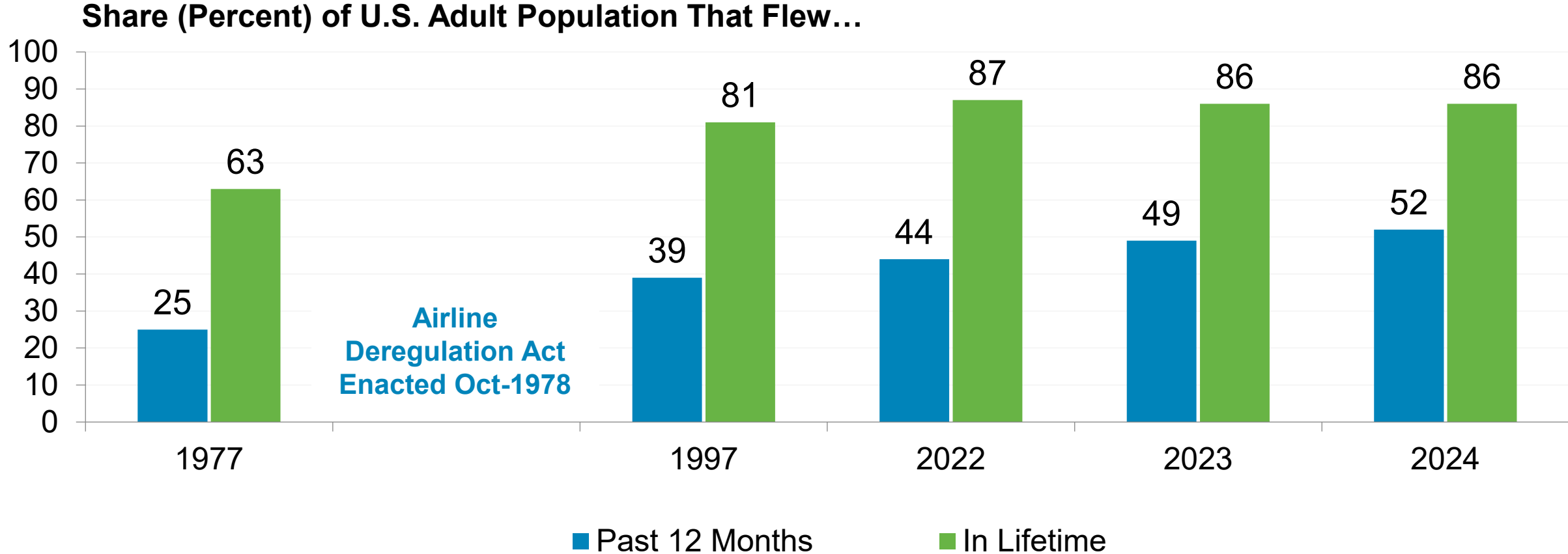
KP is the largest and most well-established online probability-based panel that is representative of the adult U.S. population. The Ipsos recruitment process employs a scientifically developed addressed-based sampling methodology using the latest Delivery Sequence File of the USPS—a database with full 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 2024 March Supplement of the Current Population Survey.

Note: The margin of sampling error for this study is plus or minus 1.7 percentage points at the 95% confidence level, for results based on the entire sample of adults and plus or minus 1.8 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 the design effect (1.08) into account.

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

Almost Nine in Ten Americans Have Flown Commercially; Over Half the Population Flew in 2024



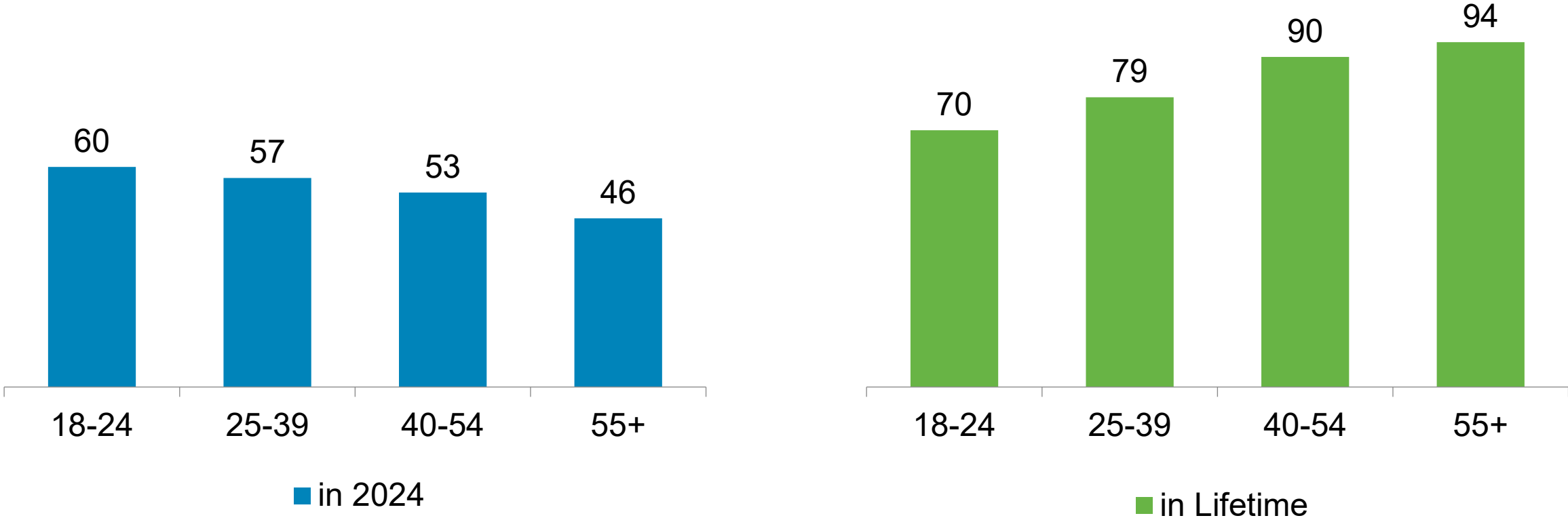
Sources: Historical A4A air travel surveys conducted by Gallup (1971 through 1997) and Ipsos

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

Among American Adults, Those Age 18-24 Had the Highest Propensity to Fly in 2024

70% of Young Adults and 94% of Older Adults Have Flown at Least Once in Their Lifetimes

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

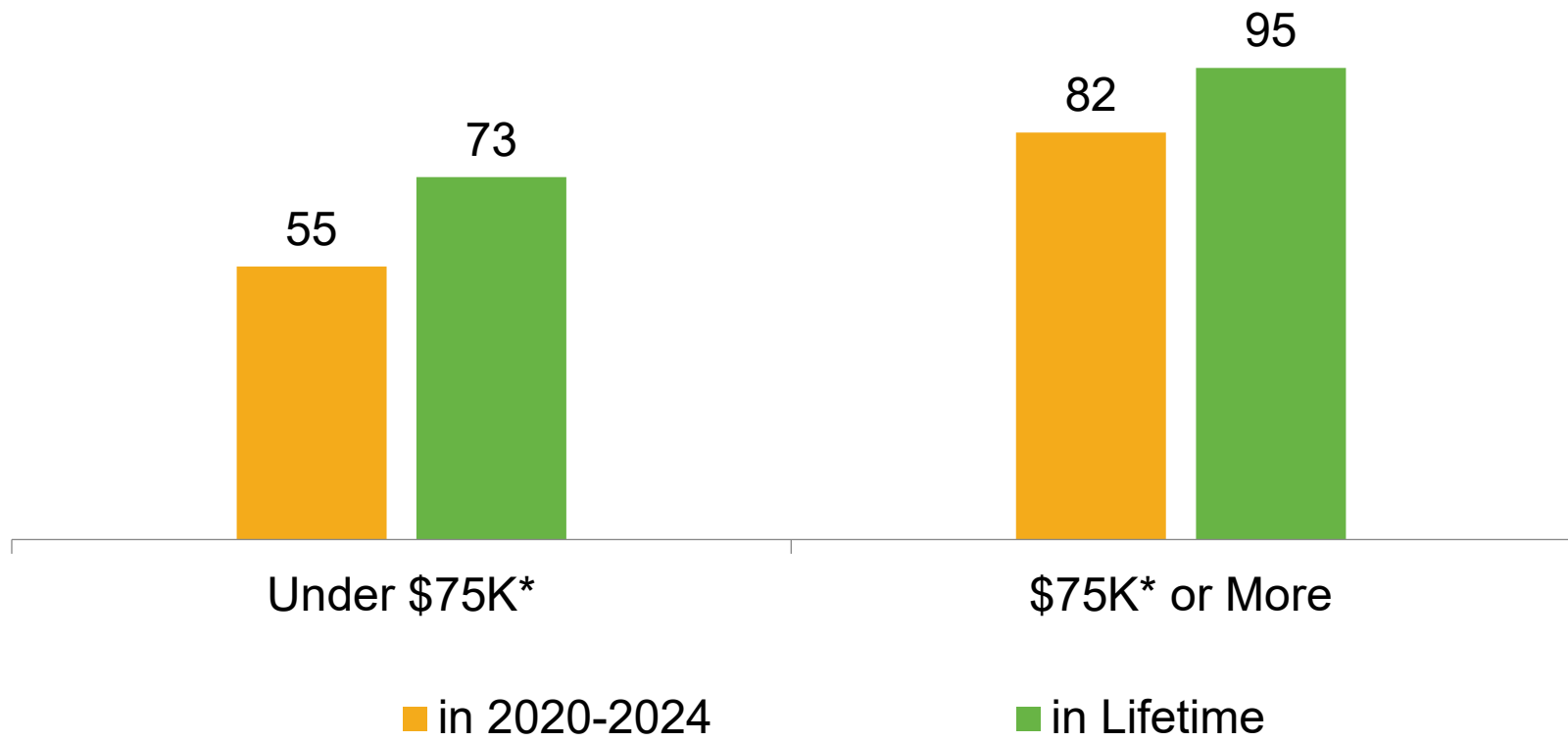


Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

Two-Thirds of Americans With Household Incomes Under \$75K Have Flown

Half of Americans With Household Incomes Under \$75K Have Flown in the Past Five Years

% Who Flew — By Household Income



Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

* According to the U.S. Census Bureau, in 2023, 47% of American households had annual incomes under \$75,000; the median was \$80,610.

Over the Past Five Years, a Large Share of Flyers Experienced a Lower-Cost Airline

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

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

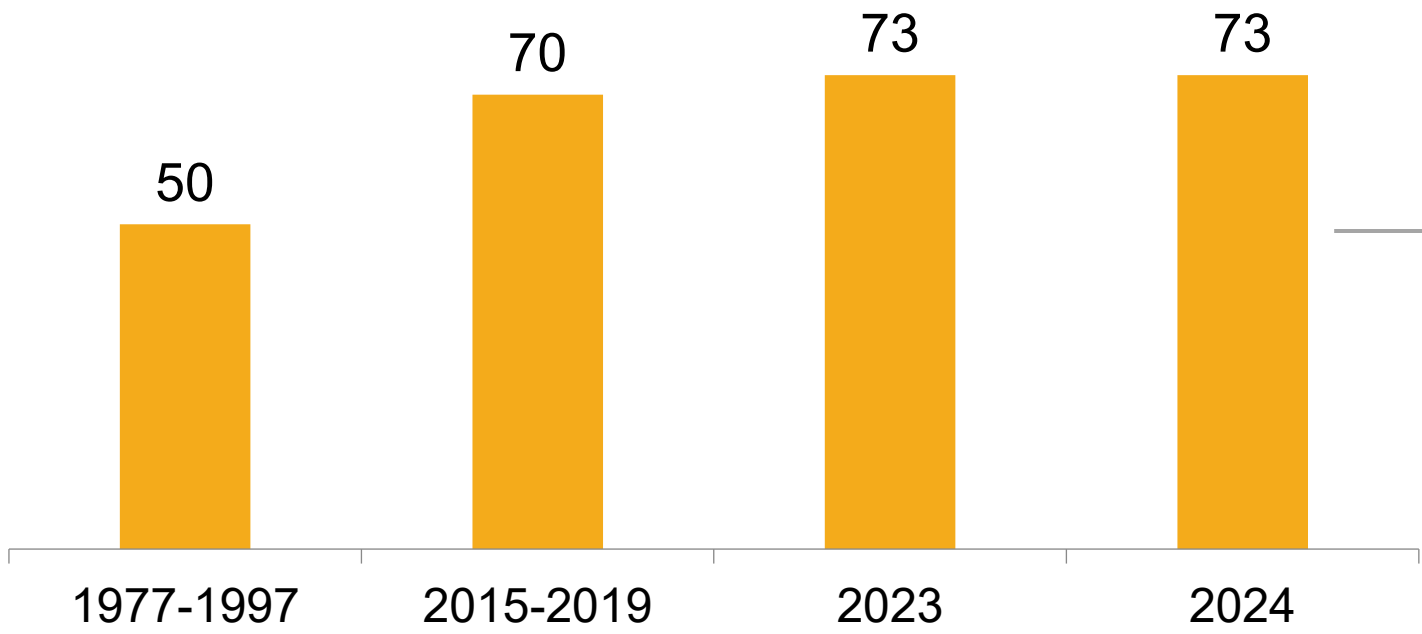
Airline Group	%
American, Delta, United	72
Alaska, Hawaiian, JetBlue, Southwest	45
Allegiant, Avelo, Breeze, Frontier, Spirit, Sun Country	23
Cape Air, Silver Airways, other U.S. airline	2
Non-U.S. airline (e.g., Air Canada, Aeromexico, British Airways, JAL, QANTAS)	16

* Check all that apply

Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

In 2024, Among Americans, More Than 70% of Air Trips Were Taken for Personal Reasons

Approximate Personal* Share (Percent) of Trips



Trips	Business	Personal
DOM	0.89 (23%)	2.13 (53%)
INT	0.19 (5%)	0.82 (20%)
Total	1.08 (28%)	2.95 (73%)

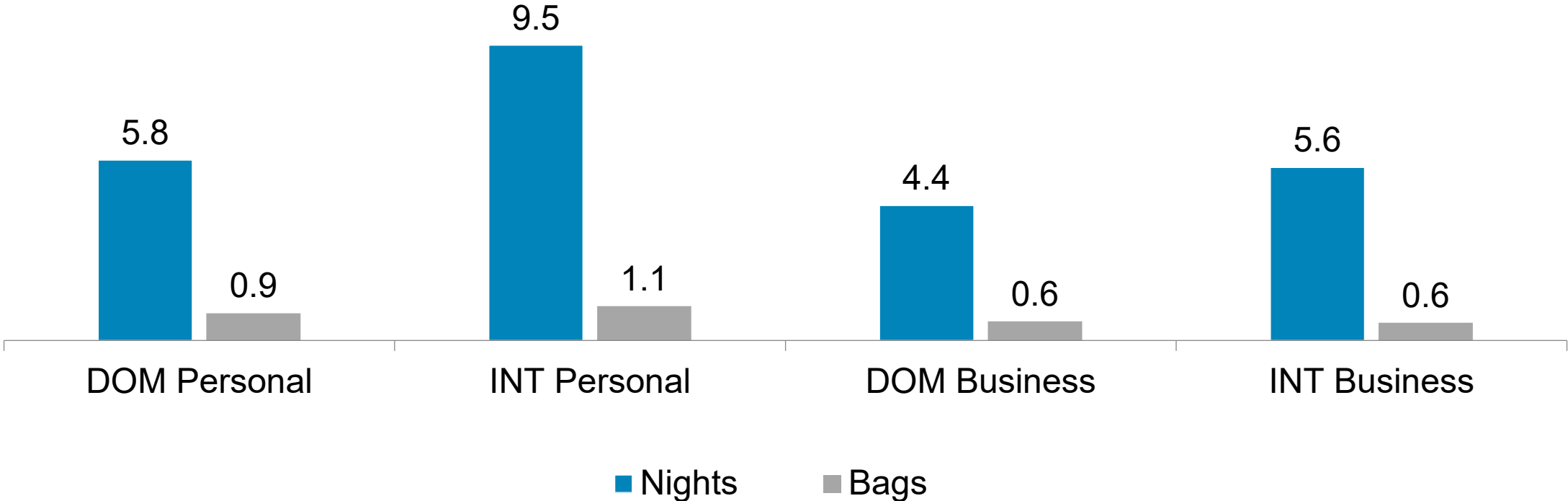
Note: Totals may not add to 100 due to rounding

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.

As Expected, Flyers Spend More Nights and Check More Bags When Traveling Internationally And They Spend More Nights and Check More Bags When Traveling for Personal Reasons

On average, in 2024, for the following types of trips, **how many nights** did you stay at your destination and **how many bags** did you check (before going through security)?



Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

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

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

More Than Half of Those Who Flew in 2024 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	24
Departure/arrival time	3	2.8	12
Seat comfort	4	4.3	3
Loyalty/frequent flyer program points/miles/perks	5	4.9	6
Availability/quality of inflight Wi-Fi/entertainment	6	5.7	1
Availability/quality of food/beverage service	7	5.9	1

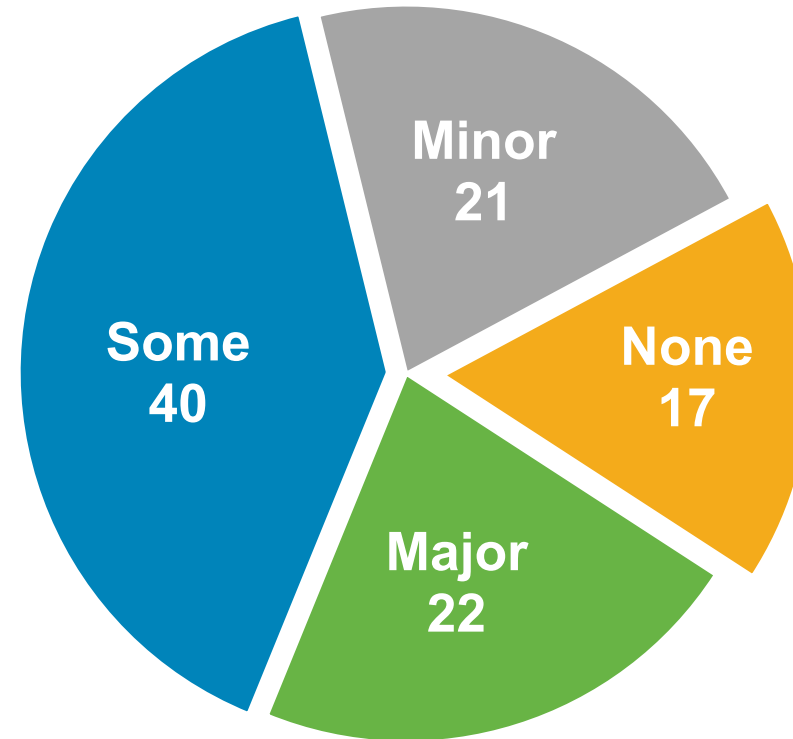
Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

83% of Flyers Say Airfare Has Impact on Choosing Vacation Destination

22% Say Airfare Has Major Impact on Choice of Destination

Impact on Destination Choice

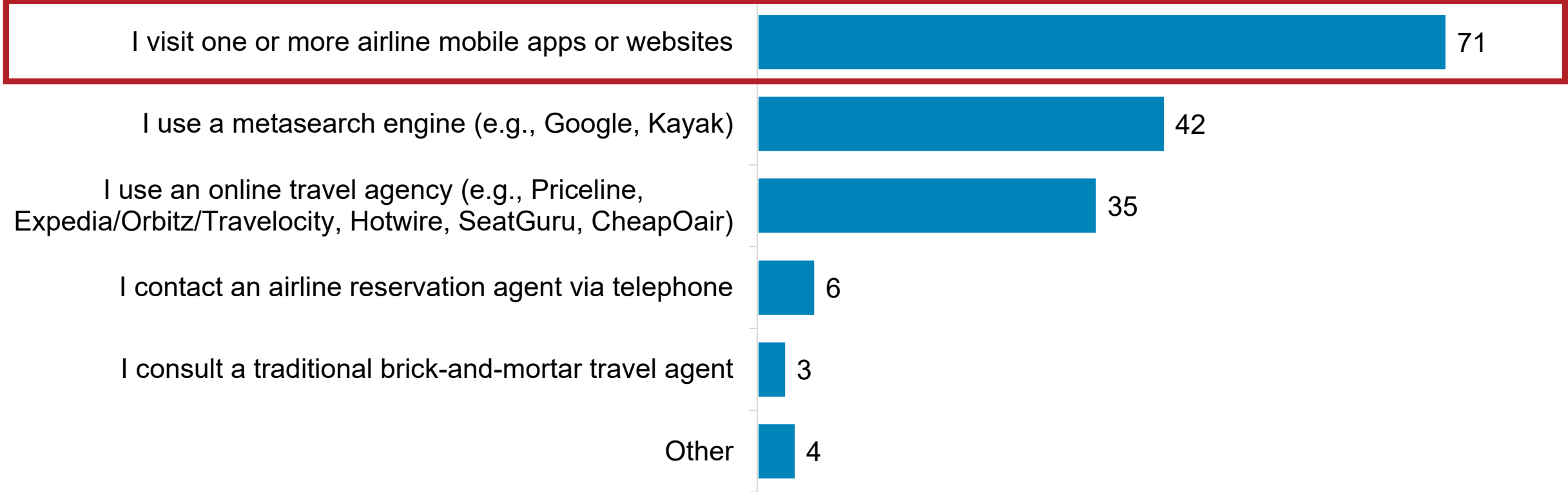
*When choosing a **vacation destination**, how much does the different cost of airfare between destinations impact where you ultimately choose to travel?*



Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

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)*

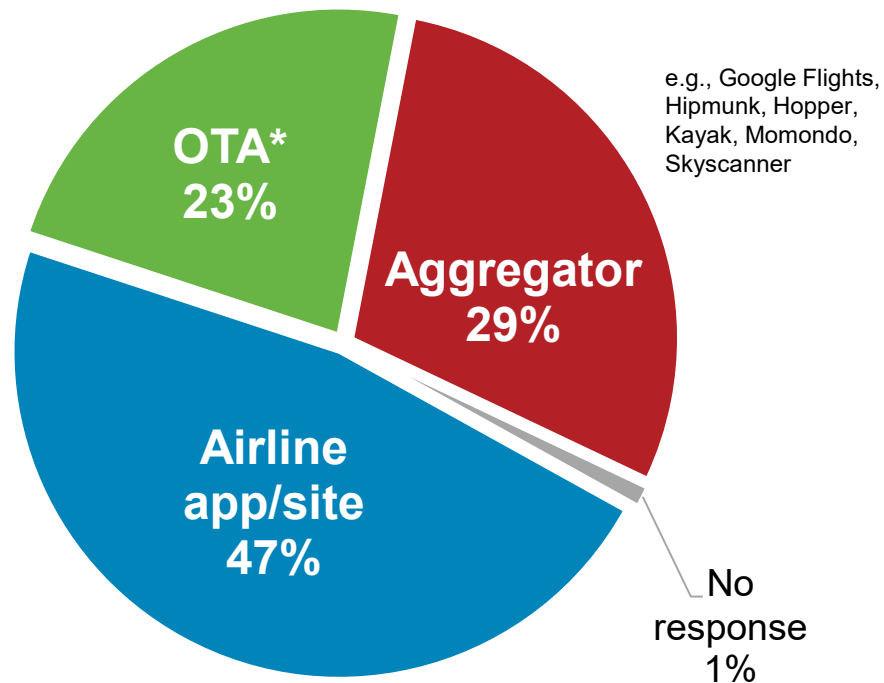


Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

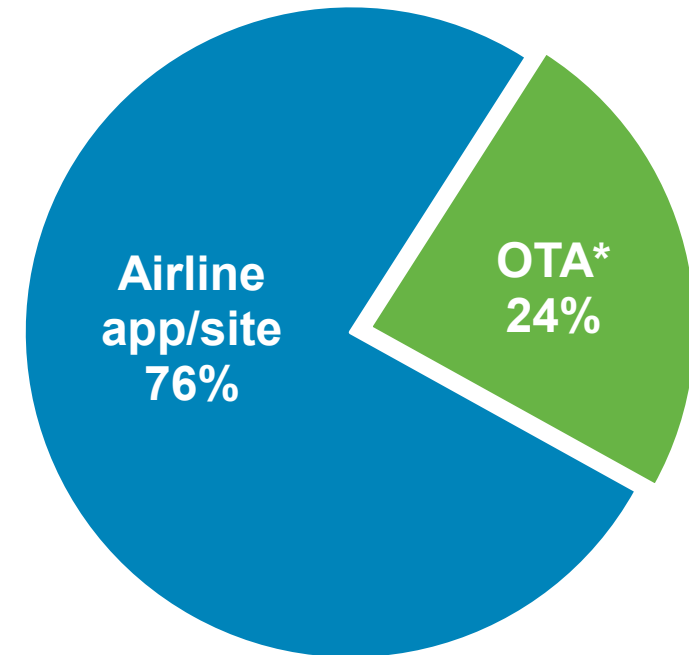
When Purchasing Flights Online, More Than 75% Prefer Airline Apps or Websites

When Shopping for Flights Online, 47% of Consumers 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 2025)

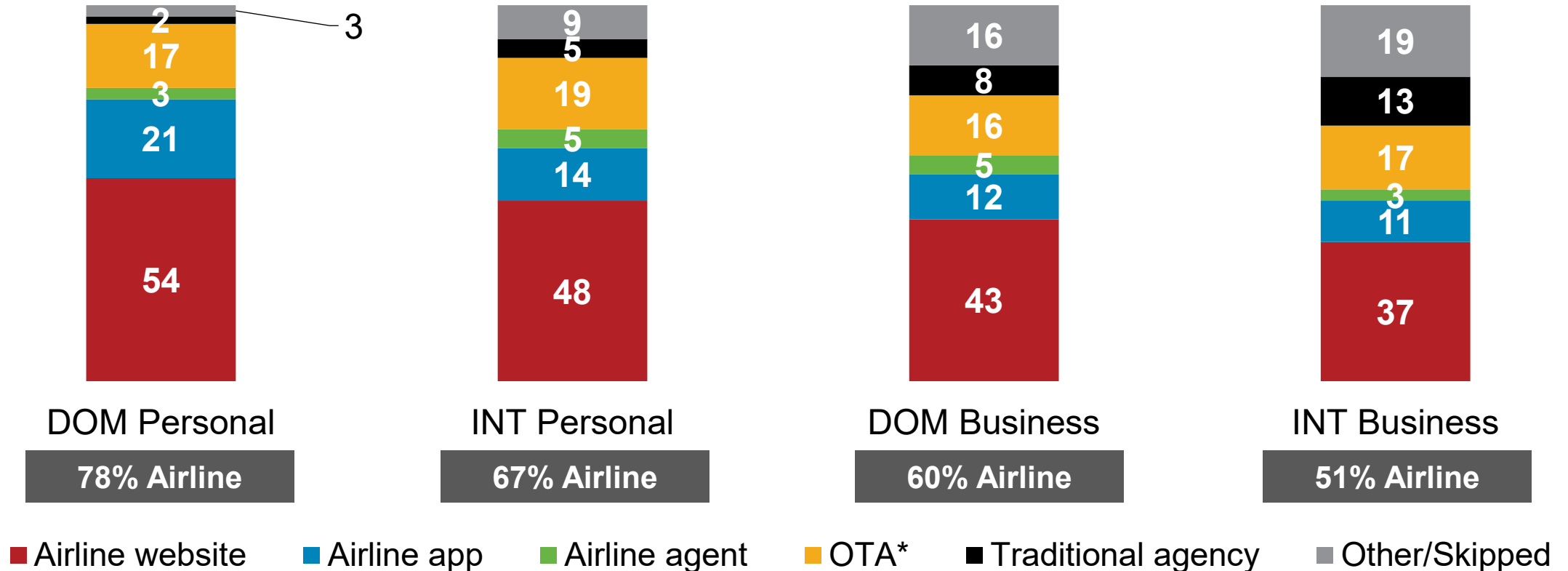
* Online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair)

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

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

75% Typically Book Domestic Trips Via Airline Apps or Sites; 62% Do the Same for International Trips

Which resource do you typically use to book your flight?



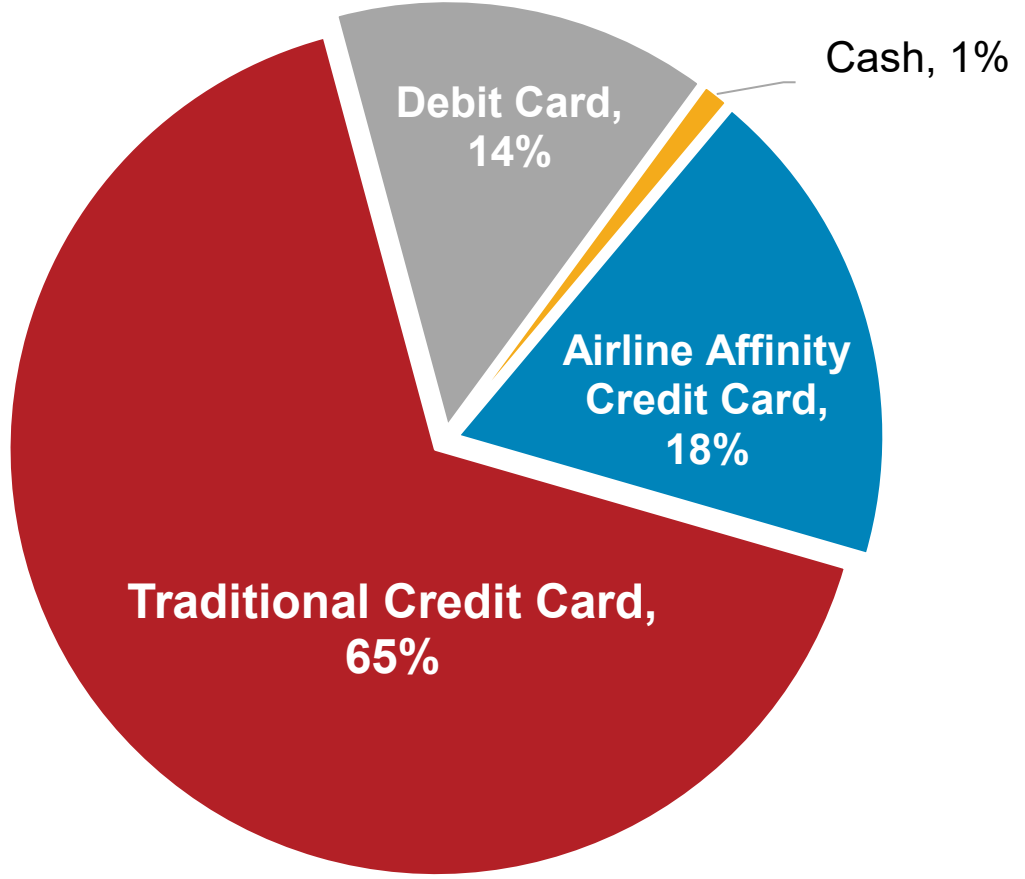
Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

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

In 2024, 83% of Personal Travelers Typically Used a Credit Card to Purchase Airline Tickets

18% Used a Cobranded Airline Affinity Charge Card

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

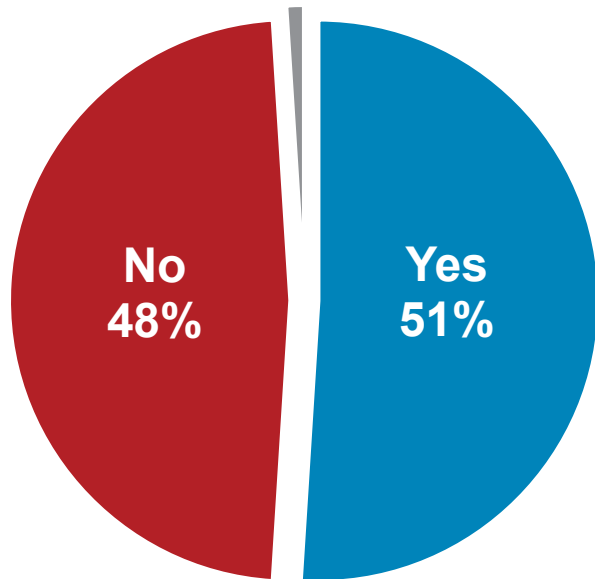


Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

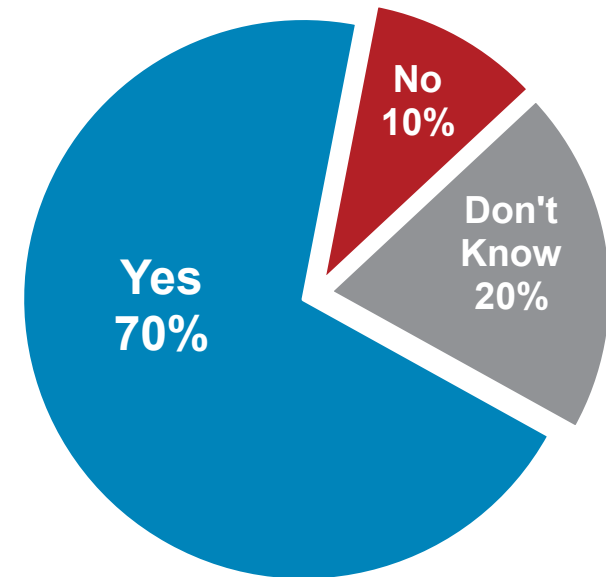
Half of 2024 Flyers Purchased a Basic Economy/Unbundled Ticket to Obtain a Lower Fare

Of Those, at Least 70% Would Consider Doing So Again

At any point in 2024, in exchange for a lower fare, did you purchase a ticket where seat selection and/or baggage (checked and/or carry-on) cost extra?



If "yes," would you consider purchasing such a ticket again?



Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

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

In 2024, 80% of Flyers Checked in Prior to Arriving at the Airport—Versus 52% in 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 %	2024 %	Change (Pts.)
Mobile device/app	29	60	+ 31
Airline website	23	20	- 3
Subtotal before airport	52	80	+ 28
Airport kiosk or ticket counter	43	18	- 25
Airport skycap (curbside)	4	1	- 3
Subtotal at airport	47	19	- 28
Other/skipped	1	1	—

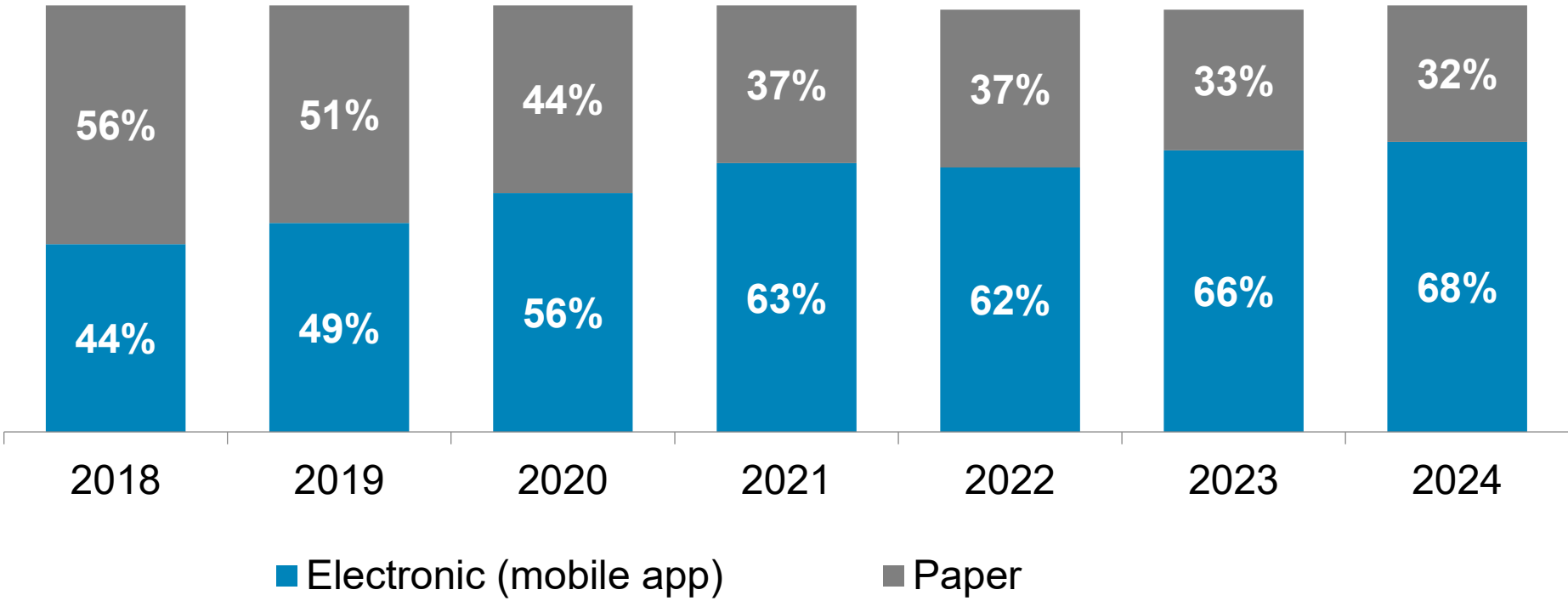
Source: A4A Air Travel Survey conducted by Ipsos

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

More Than Two-Thirds of Flyers Use Their Mobile Devices to Board the Aircraft

Use of Electronic Boarding Passes Up 24 Points From 2018-2024

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



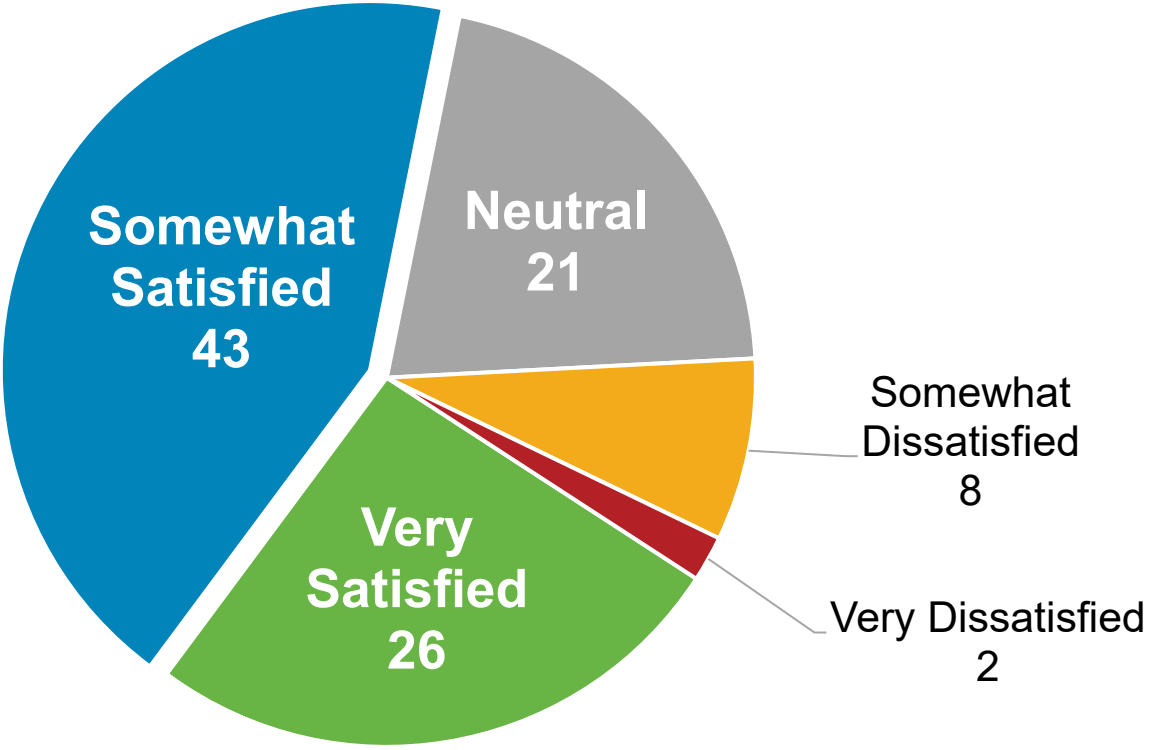
Source: A4A Air Travel Survey conducted by Ipsos

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

69% of Flyers Reported Being Satisfied With Their Overall Air-Travel Experience in 2024

21% Were Neutral; Only 2% Reported Being “Very Dissatisfied”

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



Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

Customers Continue to Want Airlines to Prioritize 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	1.55	68
More comfortable seats	2	3.37	14
Faster experience clearing security and/or customs	3	3.62	6
More flights	4	3.70	13
More room for carry-on luggage	5	4.32	2
More functionality on airline mobile apps	6	5.70	1
Better Wi-Fi	7	5.74	2

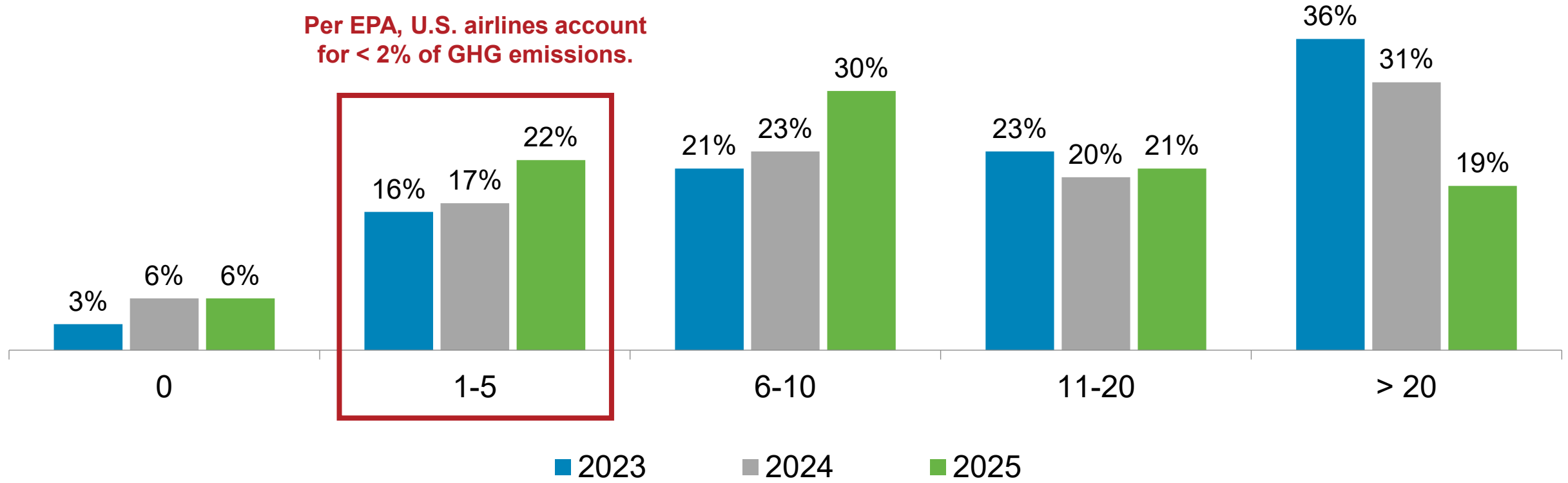
Source: A4A Air Travel Survey conducted by Ipsos (January 2025)

40% 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?

Per EPA, U.S. airlines account for < 2% of GHG emissions.



Source: A4A Air Travel Survey conducted by Ipsos (January 2023/2024/2025)

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



Airlines for America[®]

We Connect the World