



# IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

## Ipsos Poll Conducted for Airlines for America 2017 Air Travelers Survey

*These are findings from an Ipsos poll conducted 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 (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 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.*

*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 (see link below for more info on Ipsos online polling “Credibility Intervals”). 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).*

**“2016” references the first wave of the 2016 Air Travel Survey in December 2015 “\*” implies a different question wording was asked for the 2016 wave. The question wording below reflects the 2017 Air Traveler Survey reading.**

1. Have you ever flown on an airline? \* Base: All Americans

	2016	2017
Yes	81%	89%
No	19%	11%

2. Did you fly on an airline in 2016? \* Base: All Americans

	2016	2017
Yes	45%	49%
No	55%	51%

3. In 2016, how many trips did you take on airlines for the following purposes? Count each roundtrip as one trip. Base: 2016 flyers

	<u>Primarily business purposes</u>	<u>Primarily personal leisure purposes</u>	<u>Primarily personal non-leisure purposes (e.g. travelling to school attending a family event,</u>



# IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

			<u>funeral, medical matters)</u>
0-5 trips	94%	94%	98%
6-10 trips	4%	6%	2%
10 or more trips	1%	1%	*%
Mean (including 0)	1.4	2.3	0.8
<i>% of total trips</i>	<i>31%</i>	<i>51%</i>	<i>18%</i>

4. How many of your [TOTAL TRIPS] total trips by airline in 2016 combined both business and personal purposes? *Base: 2016 business flyers*

0-5 trips	89%
6-10 trips	7%
10 or more trips	4%

5. What was your destination for the [# of business trips] business trips you took in 2016? Please specify the number of air trips to each location. *Base: 2016 business flyers*

Region	Percent of all Trips
USA-50	66%
Canada	9%
Mexico	3%
The Caribbean	3%
Central America	0%
South America	3%
Europe	10%
Africa	1%
Middle East	1%
Asia/Australia/New Zealand/Guam	3%
Total Trips	3,391

6. What was your destination for the [# of personal trips] personal trips you took in 2016? Please specify the number of air trips to each location. *Base: 2016 personal flyers*

Region	Percent of Trips (2016)	Percent of Trips (2017)
USA-50	63%	64%
Canada	5%	7%
Mexico	5%	5%
The Caribbean	5%	6%
Central America	5%	3%
South America	4%	3%
Europe	8%	8%
Africa	2%	1%
Middle	2%	1%
Asia/Australia/New Zealand/Guam	3%	3%
Total Trips		7,512



## IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

7. On average, how many nights did you stay at your destination when you took the following types of trips?  
*Base: 2016 flyers*

	<u>Personal domestic</u>	<u>Personal international</u>	<u>Business domestic</u>	<u>Business international</u>
Less than 3 nights	37%	37%	71%	64%
4-7 nights	48%	29%	24%	24%
8-14 nights	11%	24%	4%	9%
15-30 nights	4%	9%	2%	2%
Over 30 nights	1%	1%	1%	1%

8. When you travel via airline on personal trips, how many people (in addition to you) do you usually travel with? *Base: 2016 personal flyers*

	<b>2016</b>	<b>2017</b>
0 people	17%	17%
1 person	41%	45%
2-4 people	36%	34%
5-9 people	N/A	5%
5-10 people	5%	N/A
11+ people	1%	N/A

9. When you travel via airline on business trips, how many people (in addition to you) do you usually travel with? *Base: 2016 business flyers*

0 people	34%
1 person	31%
2-4 people	30%
5-9 people	5%

10. When you take the following types of trips, how many pieces of luggage do you usually check prior to going through security? *Base: 2016 flyers*

2016	<u>Personal domestic</u>	<u>Personal international</u>
0	24%	9%
1	59%	59%
2	15%	27%
3	1%	3%
4	1%	2%

2017	<u>Personal domestic</u>	<u>Personal international</u>	<u>Business domestic</u>	<u>Business international</u>
0	16%	7%	22%	9%
1	59%	55%	56%	51%



# IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

2	20%	29%	16%	28%
3	3%	7%	5%	8%
4	2%	3%	1%	4%

11. When you take the following types of trips, how many carry-on/personal items do you usually take through security? *Base: 2016 flyers*

	<u>Personal domestic</u>	<u>Personal international</u>	<u>Business domestic</u>	<u>Business international</u>
0	4%	5%	7%	6%
1	66%	62%	60%	54%
2	26%	26%	27%	27%
3	2%	5%	5%	9%
4	2%	2%	1%	4%

12. At any point in 2016, did you **check** a bag? *Base: 2016 flyers*

Yes	82%
No	18%

13. At any point in 2016, did you **pay** to check a bag? *Base: 2016 bag checkers*

Yes	56%
No	44%

14. When paying to check a bag in 2016, at what point of your journey do you typically elect to make payment? *Base: 2016 paid for checked bag*

At time of ticket purchase	46%
After purchasing ticket but prior to arriving at the airport	36%
Upon arrival at the airport	18%

15. In 2016, when checking a bag that did NOT require payment, what was the primary reason that payment was not required? *Base: 2016 bag checkers*

Flew on an airline that didn't require payment	38%
Credit card entitled traveler to one or more free checked bags	14%
Traveler status with airline (e.g., elite frequent flyer)	13%
Ended up checking bag at the gate instead	8%
Had a special voucher	4%
Member of the military	2%
Other	4%
Not applicable – I always had to pay for checking my bag in 2016	17%



## IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

16. What type of ticket do you (or your company) usually book for these kinds of trips? *Base: 2016 flyers*

2016	<u>Personal domestic</u>	<u>Personal international</u>
First Class or Business Class	14%	20%
Premium Economy Class	14%	36%
Basic Economy Class	72%	44%

2017	<u>Personal domestic</u>	<u>Personal international</u>	<u>Business domestic</u>	<u>Business international</u>
First Class or Business Class	14%	25%	27%	47%
Premium Economy Class	21%	33%	29%	36%
Basic Economy Class	65%	42%	44%	18%

17. How far in advance of the trip do you usually book travel for these kinds of trips? *Base: 2016 flyers*

2016	<u>Personal domestic</u>	<u>Personal international</u>
0-3 days	8%	8%
4-7 days	11%	17%
8-21 days	16%	16%
22 days to three months	44%	30%
More than three months	21%	29%

2017	<u>Personal domestic</u>	<u>Personal international</u>	<u>Business domestic</u>	<u>Business international</u>
0-3 days	7%	9%	17%	22%
4-7 days	14%	20%	29%	37%
8-21 days	21%	18%	33%	28%
22 days to three months	43%	26%	16%	11%
More than three months	15%	27%	5%	2%

18. What resource do you usually use to book travel for these kinds of trips? *Base: 2016 flyers*

2016	<u>Personal domestic</u>	<u>Personal international</u>
Airline website	58%	34%
Online travel agency (e.g., Expedia, Orbitz, Priceline, Travelocity)	33%	49%
Traditional travel agency or corporate travel department	5%	13%
Airline reservation agent (either over the phone or in person)	4%	5%

2017	<u>Personal domestic</u>	<u>Personal international</u>	<u>Business domestic</u>	<u>Business international</u>
Airline website	55%	39%	38%	37%



## IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

Online travel agency (e.g., Expedia, Orbitz, Priceline, Travelocity)	37%	41%	32%	29%
Traditional travel agency or corporate travel department	4%	16%	26%	26%
Airline reservation agent (either over the phone or in person)	3%	4%	4%	8%

19. In 2016, when NOT checking a bag, how did you most commonly check in for trips? *Base: 2016 flyer*

Personal computer	29%
Mobile device/app	21%
Airport ticket counter	20%
Automated kiosk at the airport	19%
Curbside (at the airport)	6%
None of the above	4%

20. In 2016, when checking a bag, how do you most commonly check in for trips? *Base: 2016 flyer*

Airport ticket counter	31%
Personal computer	22%
Automated kiosk at the airport	19%
Mobile device/app	15%
Curbside (at the airport)	9%
None of the above	5%

21. In 2016, when checking a bag, how do you most commonly check in for trips? *Base: 2016 flyers*

Airport ticket counter	31%
Personal computer	22%
Automated kiosk at the airport	19%
Mobile device/app	15%
Curbside (at the airport)	9%
None of the above	5%

22. Are you currently enrolled in any frequent flyer program and do you have any status giving you extra privileges (like early boarding, lounge access or free checked bags)? *Base: 2016 flyers*

	<b>2016</b>	<b>2017</b>
Yes, frequent flyer program member, but do not have elite status with any airline	55%	55%
Yes, have elite status with at least one airline frequent flyer program	10%	13%
No	34%	32%

23. Are you currently enrolled in either of these expedited security screening programs? (Select all that apply) *Base: 2016 flyers*



## IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

	<b>2016</b>	<b>2017</b>
CBP Global Entry (via U.S. Customs and Border Protection)	13%	16%
TSA Precheck (via U.S. Transportation Security Administration)	19%	22%
No, I am not enrolled in either of these	73%	68%

24. What is the **primary** reason you are not enrolled in either of these expedited security screening programs? *Base: Not enrolled in expedited security programs*

Costs (fees) outweigh benefits (i.e., too expensive, don't fly often enough, line isn't that much shorter)	43%
Not aware of the program	30%
It's too difficult/cumbersome to enroll in the program	8%
I choose not to share personal information with the government	6%
Other	13%

25. 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? *Base: All Americans*

	<b>2016</b>	<b>2017</b>
More trips	29%	28%
Fewer trips	55%	56%
About the same number of trips	17%	17%

26. What is the primary factor that will result in more air travel in 2017? *Base: All Americans flying more in 2017*

Greater need/desire to travel by air for personal reasons	43%
Increase in personal income and/or household wealth	17%
Greater need to travel by air for business reasons	15%
Greater affordability of air travel	11%
Greater availability of destinations or convenient flight schedules	8%
Other	7%

27. When traveling for **business**, assuming all of these options were available to you, which is your typical means of getting to the airport? *Base: 2016 business flyers*

Personal vehicle	37%
Uber or Lyft	20%
Traditional taxi	15%
Shared van (airport shuttle, hotel shuttle, etc.)	11%
Limousine or car service	9%
Public transit (bus, train, etc.)	7%
Other	1%

28. When traveling for **personal** reasons, assuming all of these options were available to you, which is your typical means of getting to the airport? *Base: 2016 personal flyers*

Personal vehicle	54%
------------------	-----



## IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

Uber or Lyft	14%
Traditional taxi	9%
Shared van (airport shuttle, hotel shuttle, etc.)	7%
Public transit (bus, train, etc.)	7%
Limousine or car service	5%
Other	4%

29. For any trip in 2016, did you fly from an airport that was not the closest airport to your home or office?  
*Base: 2016 flyers*

Yes	36%
No	64%

30. Assuming you have decided to travel by air and assuming you have a choice of originating airports, how far (measured in minutes of travel time to from home or work to the airport) are you willing to journey by car/bus/train for a preferred air travel itinerary (price/schedule)? *Base: All Americans*

Up to 30 minutes	29%
Up to 60 minutes	36%
Up to 90 minutes	16%
Up to 2 hours	10%
Up to 3 hours	4%
Up to 4 hours	2%
More than 4 hours	3%

31. When choosing an airport other than the one closest to your home or office, what are the most important factors for doing so, with 1 being the most important and 5 being the least important? *Base: 2016 flyers who flew from an airport that was not closest to their home/work*

	Ticket price	Flight schedule	Airline frequent flyer program	Airport amenities	Ease of airport navigation
1	44%	25%	11%	10%	11%
2	23%	39%	11%	11%	16%
3	13%	14%	24%	18%	33%
4	8%	13%	22%	31%	26%
5	14%	10%	31%	30%	15%

32. When traveling for business, 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? *Base: All Americans*

	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational quality	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
1	23%	6%	8%	9%	3%	3%	40%	6%
2	27%	7%	13%	15%	6%	5%	18%	10%
3	14%	10%	15%	21%	10%	5%	11%	14%
4	9%	9%	18%	17%	13%	8%	8%	18%
5	8%	9%	17%	14%	17%	10%	7%	18%





## IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

6	8%	12%	13%	10%	21%	13%	6%	16%
7	6%	19%	10%	8%	19%	21%	5%	12%
8	4%	27%	6%	5%	11%	34%	5%	6%

33. When traveling for personal reasons, 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? *Base: All Americans*

	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational quality	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
1	16%	6%	7%	8%	4%	3%	52%	4%
2	31%	7%	12%	13%	6%	4%	17%	9%
3	16%	10%	16%	21%	10%	6%	8%	13%
4	11%	9%	19%	18%	14%	6%	6%	17%
5	8%	10%	16%	15%	18%	9%	5%	19%
6	8%	12%	15%	12%	21%	12%	4%	17%
7	6%	19%	9%	8%	18%	22%	4%	14%
8	4%	28%	6%	5%	10%	38%	3%	6%

34. Thinking about your overall experience with air travel in 2016, how satisfied or dissatisfied are you? *Base: 2016 Flyers*

	2016	2017
Very satisfied	35%	43%
Somewhat satisfied	44%	42%
Neither satisfied nor dissatisfied	14%	10%
Somewhat dissatisfied	5%	5%
Very dissatisfied	1%	1%

35. Of all the flights you took in 2016, what amount were **satisfactory** to you? *Base: 2016 Flyers*

All were satisfactory	48%
Most were satisfactory	39%
About half and half	10%
Most were unsatisfactory	2%
All were unsatisfactory	0%

36. Which of the following is typically the most stressful part of the journey for you? Please rank with 1 being the most stressful part and 6 being the least stressful part. *Base: All Americans*

	Shopping for/purchasing a ticket	Checking in for the flight	Getting through security	Boarding process	Reliability of on-time departure and arrival	Awaiting checked baggage
1	17%	10%	34%	9%	18%	13%
2	13%	17%	19%	16%	18%	17%
3	12%	18%	16%	17%	19%	18%
4	13%	18%	13%	21%	18%	17%
5	16%	21%	11%	21%	16%	17%
6	30%	17%	8%	15%	12%	19%



## IPSOS / AIRLINES FOR AMERICA POLL DATA

Prepared by Ipsos Public Affairs

37. In 2016, on a scale of 1 to 5, how would you rate your overall satisfaction with each of the following?  
*Base: 2016 flyers*

	Shopping for/purchasing a ticket	Checking in for the flight	Getting through security	Boarding process	Reliability of on-time departure and arrival	Awaiting checked baggage
1-Very dissatisfied	2%	1%	7%	3%	3%	4%
2	5%	6%	12%	9%	9%	11%
3	25%	23%	29%	28%	27%	33%
4	37%	39%	31%	37%	38%	31%
5-Very satisfied	31%	32%	20%	24%	23%	21%

38. At any point in 2016, did you submit a complaint to the U.S. Department Transportation (DOT) about a U.S.-based airline? *Base: 2016 flyers*

Yes	12%
No	88%

39. At any point in 2016, did you submit a complaint directly to a U.S.-based airline? *Base: 2016 flyers*

Yes	15%
No	85%

40. Did the airline address your complaint satisfactorily? *Base: Those who complained directly to airline*

Yes	81%
No	19%

41. As you may know, the U.S. air traffic control system is both regulated and operated by the federal government. Which of the following is closer to your opinion? *Base: All Americans*

The U.S. air traffic control system uses out of date equipment and is weakened by government shutdowns and budget uncertainty	44%
The U.S. air traffic control system functions best under government management	56%

42. 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?

*Base: All Americans*

Strongly favor	15%
Somewhat favor	63%
Somewhat oppose	18%
Strongly oppose	4%



IPSOS / AIRLINES FOR AMERICA POLL DATA  
Prepared by Ipsos Public Affairs

43. Do you have an adaptive need that makes your experience different than that of other air travelers? *Base: All Americans*

Mobility-related adaptive need (e.g., wheelchair)	12%
Sensory-related adaptive need (e.g., vision impairment)	8%
Other	4%
None of the above	79%