



Topline Findings

Airlines for America – 2018 Annual Air Travel Survey

January 2018

These are findings from an Ipsos poll conducted January 8-17, 2018 on behalf of Airlines for America. For the survey, a sample of 5,046 adults age 18+ from the continental U.S., Alaska and Hawaii was interviewed online in English. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of ± 1.6 percentage points for all respondents, and ± 2.3 percentage points for those who flew on an airline in 2017.

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 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, region, race/ethnicity and income. For more information about Ipsos’ online polling methodology, please visit our [Public Opinion Polling and Communication](#) page where you can download our brochure, see our public release protocol, or contact us.

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. 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=5,046, DEFF=1.5, adjusted Confidence Interval=3.1).

1. Have you ever flown on an airline?

	All Respondents 2018	All Respondents 2017	All Respondents 2016
	(n=5,046)	(n=5,047)	(n=3,019)
Yes	88%	89%	81%
No	12%	11%	19%

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Topline – continued –

2. Did you fly on an airline in 2017?

	All Respondents 2018	All Respondents 2017	Respondents Who Flew on Airline, 2016
	(n=5,046)	(n=5,047)	(n=2,521)
Yes	48%	49%	54%
No	52%	51%	44%

3. In 2017, how many trips did you take on airlines for the following purposes? Please think about domestic and international trips separately, and count each roundtrip as one trip. *(Please note that trended results for this question are not directly comparable due to changes in how the question was asked)*

Base: 2017 Flyers	Domestic – Primarily business purposes	Domestic – Primarily personal leisure purposes	Domestic – Primarily personal non-leisure purposes
	(n=2,262)	(n=2,262)	(n=2,262)
0-5 trips	96%	96%	98%
6-10 trips	2%	3%	1%
10 or more trips	1%	1%	*
Mean (including 0)	1.1	1.8	0.7
% who took at least 1 trip	36%	80%	31%
% of total trips	20%	34%	13%

Base: 2017 Flyers	International – Primarily business purposes	International – Primarily personal leisure purposes	International – Primarily personal non-leisure purposes
	(n=2,262)	(n=2,262)	(n=2,262)
0-5 trips	99%	99%	99%
6-10 trips	1%	1%	1%
10 or more trips	*	*	*
Mean (including 0)	0.5	0.8	0.4
% who took at least 1 trip	20%	45%	19%
% of total trips	9%	16%	8%

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Topline – continued –

Base: 2016 Flyers	Primarily business purposes	Primarily personal leisure purposes	Primarily personal non-leisure purposes
	(n=2,276)	(n=2,276)	(n=2,276)
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
% of total trips	31%	51%	18%

4. Here are the total trips you have taken on airlines in 2017. Is this correct?
5. On average, how many nights did you stay at your destination when you took the following types of trips?

Base: 2017 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=2,007)	(n=1,100)	(n=799)	(n=473)
Less than 3 nights	41%	38%	68%	57%
4-7 nights	45%	29%	23%	29%
8-14 nights	11%	23%	6%	9%
15-30 nights	3%	8%	3%	3%
Over 30 nights	1%	2%	1%	1%

Base: 2016 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=1,848)	(n=892)	(n=728)	(n=403)
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%

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Topline – continued –

6. When you travel via airline on personal trips, how many people (in addition to you) do you usually travel with?
(Please note that trended results for 2016 are not directly comparable due to changes in how the question was asked)

	Personal Flyers 2018	Personal Flyers 2017	Personal Flyers 2016
	(n=2,152)	(n=2,180)	(n=1,172)
0 people	17%	17%	17%
1 person	48%	45%	41%
2-4 people	32%	34%	36%
5-9 people	3%	5%	5%*

7. When you take the following types of trips, how many pieces of luggage do you usually check prior to going through security?

Base: 2017 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=2,007)	(n=1,100)	(n=799)	(n=473)
0	15%	10%	19%	13%
1	60%	51%	56%	44%
2	19%	31%	14%	22%
3	4%	6%	9%	7%
4	2%	3%	2%	14%
Average (including 0)	1.2	1.4	1.2	1.7

Base: 2016 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=1,848)	(n=892)	(n=728)	(n=403)
0	16%	7%	22%	9%
1	59%	55%	56%	51%
2	20%	29%	16%	28%
3	3%	7%	5%	8%
4	2%	3%	1%	4%
Average (including 0)	1.2	1.5	1.1	1.5

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Topline – continued –

Base: 2015 Flyers	Personal domestic	Personal international
	(n=1,029)	(n=352)
0	24%	9%
1	59%	58%
2	15%	27%
3	1%	3%
4	1%	2%

8. When you take the following types of trips, how many carry-on/personal items do you usually take through security?

Base: 2017 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=2,007)	(n=1,100)	(n=799)	(n=473)
0	5%	7%	7%	10%
1	64%	59%	57%	50%
2	26%	29%	24%	21%
3	2%	3%	9%	5%
4	2%	2%	2%	14%
Average (including 0)	1.3	1.3	1.4	1.6

Base: 2016 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=1,848)	(n=892)	(n=728)	(n=403)
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%

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Topline – continued –

9. At any point in 2017, did you check a bag?

	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n=2,271)
Yes	82%	82%
No	18%	18%

10. At any point in 2017, did you **pay** to check a bag while taking a personal trip? *(Please note that trended results for this question are not directly comparable due to changes in how the question was asked)*

	2017 Personal Flyers Who Checked a Bag	2016 Flyers Who Checked a Bag
	(n=1,760)	(n=1,864)
Yes	54%	56%
No	46%	44%

11. When paying to check a bag in 2017, at what point of your journey do you typically elect to make payment?

	2017 Personal Flyers Who Paid to Check a Bag	2016 Flyers Who Paid to Check a Bag
	(n=1,010)	(n=1,063)
At time of ticket purchase	46%	46%
Upon arrival at the airport	38%	36%
After purchasing ticket but prior to arriving at the airport	16%	18%

12. In 2017, when checking a bag that did NOT require payment, what were the reason(s) that payment was not required? *(Please note that trended results for this question are not directly comparable due to changes in how the question was asked)*

	2017 Flyers Who Checked a Bag	2016 Flyers Who Checked a Bag
	(n=1,843)	(n=1,864)
Flew on an airline that didn't require payment	46%	38%

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Topline – continued –

	2017 Flyers Who Checked a Bag	2016 Flyers Who Checked a Bag
	(n=1,843)	(n=1,864)
Credit card entitled traveler to one or more free checked bags	18%	14%
Traveler status with airline (e.g., elite frequent flyer)	18%	13%
Ended up checking bag at the gate instead	14%	8%
Had a special voucher	5%	4%
Member of the military	4%	2%
Other	4%	4%
Not applicable - I always had to pay for checking my bag	20%	17%

13. What type of ticket do you (or your company) usually book for these kinds of trips?

Base: 2017 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=2,007)	(n=1,100)	(n=799)	(n=473)
First Class or Business Class	13%	16%	22%	41%
Premium Economy Class	18%	31%	28%	37%
Basic Economy Class	70%	53%	51%	22%

Base: 2016 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=1,848)	(n=892)	(n=728)	(n=403)
First Class or Business Class	14%	25%	27%	47%
Premium Economy Class	21%	33%	29%	36%
Basic Economy Class	65%	42%	44%	18%

Base: 2015 Flyers	Personal domestic	Personal international
	(n=1,029)	(n=352)
First Class or Business Class	14%	20%
Premium Economy Class	14%	36%
Basic Economy Class	72%	44%

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Topline – continued –

14. How far in advance of the trip do you usually book travel for these kinds of trips?

Base: 2017 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=2,007)	(n=1,100)	(n=799)	(n=473)
0-3 days	7%	10%	17%	18%
4-7 days	14%	18%	26%	36%
8-21 days	18%	13%	29%	24%
22 days to three months	42%	28%	25%	15%
More than three months	19%	31%	4%	5%

Base: 2016 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=1,848)	(n=892)	(n=728)	(n=403)
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%

Base: 2015 Flyers	Personal domestic	Personal international
	(n=1,029)	(n=352)
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%

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Topline – continued –

15. When flying, which resources do you typically use to identify/search for the optimal itinerary (e.g., times of day, routing, fare, aircraft type)?

Base: 2017 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=2,007)	(n=1,100)	(n=799)	(n=473)
Airline website	68%	56%	49%	47%
Online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair)	48%	45%	37%	38%
Aggregator/Metasearch Engine (e.g., Google Flights, Hipmunk, Kayak, Momondo, Skyscanner)	19%	21%	16%	19%
Airline reservation/ticketing agent	17%	21%	23%	28%
Traditional (bricks and mortar) travel agency or corporate travel department	9%	17%	17%	25%
Other	1%	3%	6%	2%

16. What resource do you usually use to book travel for these kinds of trips? *(Please note that trended results for this question are not directly comparable due to changes in how the question was asked)*

Base: 2017 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=2,007)	(n=1,100)	(n=799)	(n=473)
Airline website	56%	40%	39%	34%
Online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair)	36%	40%	29%	38%
Traditional (bricks and mortar) travel agency or corporate travel department	3%	11%	16%	13%
Airline reservation/ticketing agent	4%	7%	11%	13%
Other	1%	3%	6%	2%

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Topline – continued –

Base: 2016 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=1,848)	(n=892)	(n=728)	(n=403)
Airline website	55%	39%	38%	37%
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%

Base: 2015 Flyers	Personal domestic	Personal international	Business domestic	Business international
	(n=1,029)	(n=352)	(n=278)	(n=161)
Airline website	58%	34%	44%	34%
Online travel agency (e.g., Expedia, Orbitz, Priceline, Travelocity)	33%	49%	25%	34%
Traditional travel agency or corporate travel department	5%	13%	28%	20%
Airline reservation agent (either over the phone or in person)	4%	5%	3%	12%

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

	Personal Flyers 2018
	(n=2,152)
Airline affinity card (e.g., Alaska Airlines Visa Signature, JetBlue Card, United MileagePlus)	13%
Other credit/charge card (e.g., American Express, Discover, MasterCard, Visa)	60%
Debit card	21%
EWallet (e.g., Alipay, Apple Pay, Google Wallet, MasterPass, PayPal, Samsung Pay)	3%
Cash (travel agency or at airport)	3%

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Topline – continued –

18. Why did you choose this form of payment? Please select all that apply.

	Personal Flyers 2018
	(n=2,152)
Airline miles	35%
Rebate by card provider	26%
No surcharge	23%
Other airline benefit (e.g., priority boarding, free checked bags)	17%
Installment option (e.g., BillMeLater)	10%
Other	15%

19. In 2017, when NOT checking a bag, how did you most commonly check in for trips?

	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n=2,271)
Personal computer	25%	29%
Mobile device/app	25%	21%
Automated kiosk at the airport	21%	19%
Airport ticket counter	18%	20%
Curbside (at the airport)	6%	6%
None of the above	6%	4%

20. In 2017, when checking a bag, how do you most commonly check in for trips?

	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n=2,271)
Airport ticket counter	29%	31%
Automated kiosk at the airport	20%	19%
Personal computer	19%	22%

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	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n=2,271)
Mobile device/app	17%	15%
Curbside (at the airport)	10%	9%
None of the above	5%	5%

21. For any of your airline trips in 2017, did you purchase a voluntary carbon offset?

	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n=2,271)
Yes	10%	13%
No	90%	87%

22. How competitive or not do you perceive the airline industry to be when it comes to the following? Please rate each item using the scale below.

Choice of carriers (number and/or type)

	All Respondents (2018)
	(n=5,033)
5 - Very competitive	18%
4 - Somewhat competitive	42%
3 – Neutral	28%
2 - Not very competitive	9%
1 - Not at all competitive	2%
Very/Somewhat Competitive	60%
Not very/Not at all Competitive	11%
Mean	3.6

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Topline – continued –

Price/Affordability

	All Respondents (2018)
	(n=5,033)
5 - Very competitive	21%
4 - Somewhat competitive	39%
3 – Neutral	22%
2 - Not very competitive	15%
1 - Not at all competitive	4%
Very/Somewhat Competitive	59%
Not very/Not at all Competitive	19%
Mean	3.6

Flight times or routes

	All Respondents (2018)
	(n=5,033)
5 - Very competitive	16%
4 - Somewhat competitive	40%
3 – Neutral	31%
2 - Not very competitive	11%
1 - Not at all competitive	3%
Very/Somewhat Competitive	56%
Not very/Not at all Competitive	13%
Mean	3.6

23. In your opinion, how has airline industry competitiveness changed, if at all, relative to five years ago?

	All Respondents (2018)
	(n=5,033)
Less competitive than it was five years ago	24%



Topline – continued –

	All Respondents (2018)
	(n=5,033)
About the same as it was five years ago	45%
More competitive than it was five years ago	31%

24. 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)?

	2017 Flyers (2018)	2016 Flyers (2017)	2015 Flyers (2016)
	(n=2,262)	(n=2,276)	(n=1,261)
Yes, frequent flyer program member, but do not have elite status with any airline	53%	55%	55%
Yes, have elite status with at least one airline frequent flyer program	13%	13%	10%
No	34%	32%	34%

25. Which of the following trusted traveler / expedited security-screening programs are you enrolled in? *(Please note that trended results for this question are not directly comparable due to changes in how the question was asked)*

	2017 Flyers (2018)	2016 Flyers (2017)	2015 Flyers (2016)
	(n=2,262)	(n=2,276)	(n=1,261)
Global Entry	16%	16%	13%
TSA PreCheck	20%	22%	19%
I am not enrolled in either of these	64%	68%	73%

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Topline – continued –

26. How did you learn about the trusted traveler program?

	2017 Flyers Enrolled in Global Entry/ TSA PreCheck
	(n=813)
Saw TSA PreCheck lanes or signage at airports	39%
Friend, family member or colleague	37%
News/social media	24%
Message from website of a hotel loyalty program, credit card company or airline	21%
Searched specific government website (e.g., TSA.gov, CBP.gov, DHS.gov)	21%
Conducted a general internet search (e.g., Bing, Google, Yahoo)	17%
Advertising (print or digital)	16%
Some other source	6%

27. How likely are you to continue/renew your membership to a trusted traveler program when your current enrollment expires?

	2017 Flyers Enrolled in Global Entry/ TSA PreCheck
	(n=813)
5 - Very likely	57%
4 - Somewhat likely	24%
3 – Neutral	12%
2 – Somewhat unlikely	2%
1 – Very unlikely	4%
Very/Somewhat Likely	81%
Very/Somewhat Unlikely	6%

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Topline – continued –

28. What is the primary reason you are not enrolled in one of these trusted traveler / expedited security-screening programs? *(Please note that trended results for this question are not directly comparable due to changes in how the question was asked)*

	2017 Flyers NOT Enrolled in Global Entry/ TSA PreCheck	2016 Flyers NOT Enrolled in Global Entry/ TSA PreCheck
	(n=1,449)	(n=1,568)
I don't travel often enough to justify the time and money to enroll	52%	-
The application fee (\$85 for 5-year PreCheck membership or \$100 for 5-year Global Entry membership) is too high	12%	-
I'm not aware of these programs or their benefits	8%	30%
The regular (non-expedited) lanes at TSA/Customs are fast enough for me	7%	-
I don't know how/where to apply	6%	-
It's too difficult/cumbersome to enroll in the program (e.g., application process, location of enrollment center, time required to go/spend in person to an enrollment center)	5%	8%
I choose not to share biometric or other personal information with the government	3%	6%
I haven't been able to get a convenient appointment time	3%	-
I'm not eligible to apply (e.g., non-permanent U.S. resident)	1%	-
Other	2%	13%

29. How likely are you to enroll in Global Entry or TSA PreCheck within the next 12 months?

	2017 Flyers NOT Enrolled in Global Entry/ TSA PreCheck
	(n=1,449)
5 - Very likely	3%
4 - Somewhat likely	11%
3 – Neutral	25%

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	2017 Flyers NOT Enrolled in Global Entry/ TSA PreCheck
	(n=1,449)
2 – Somewhat unlikely	19%
1 – Very unlikely	42%
Very/Somewhat Likely	14%
Very/Somewhat Unlikely	61%

30. In 2017, how did you typically clear U.S. Customs/Immigration upon returning to the United States? Please select one response only.

	2017 International Flyers
	(n=1,163)
Proceeded directly to the Customs/Immigration officer, without using any digital tools to expedite clearance	52%
Used a Global Entry kiosk before proceeding to the officer	31%
Used the 'Mobile Passport' app (part of the Mobile Passport Control or 'MPC' program) before proceeding to the officer	16%

31. Thinking about all your international trips in 2017, how would you rate your satisfaction with the following?
Please rate each item using the 5-point scale below.

Clearing U.S. Customs/Immigration

	2017 International Flyers	2017 International Flyers, Global Entry	2017 International Flyers, Non-Global Entry
	(n=1,163)	(n=369)	(n=794)
5 - Very satisfied	35%	51%	29%
4 - Somewhat satisfied	37%	33%	38%
3 – Neutral	20%	14%	22%
2 – Somewhat dissatisfied	6%	2%	7%
1 – Very dissatisfied	1%	-	1%

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Topline – continued –

	2017 International Flyers	2017 International Flyers, Global Entry	2017 International Flyers, Non-Global Entry
	(n=1,163)	(n=369)	(n=794)
Not applicable	1%	-	2%
Very/Somewhat Satisfied	72%	83%	67%
Very/Somewhat Dissatisfied	7%	3%	9%
Mean	4.0	4.3	3.9

Retrieving your luggage after clearing U.S. Customs/Immigration

	2017 International Flyers	2017 International Flyers, Global Entry	2017 International Flyers, Non-Global Entry
	(n=1,163)	(n=369)	(n=794)
5 - Very satisfied	32%	45%	27%
4 - Somewhat satisfied	39%	36%	40%
3 – Neutral	20%	14%	23%
2 – Somewhat dissatisfied	4%	3%	5%
1 – Very dissatisfied	1%	1%	1%
Not applicable	3%	1%	4%
Very/Somewhat Satisfied	71%	81%	67%
Very/Somewhat Dissatisfied	6%	4%	7%
Mean	4.0	4.2	3.9

32. When traveling for business, assuming all of these options were available to you, which is your typical means of getting to the airport?

	2017 Business Flyers (2018)	2016 Business Flyers (2017)
	(n=830)	(n=894)
Personal vehicle	40%	37%
Uber or Lyft	25%	20%
Traditional taxi	12%	15%
Shared van (airport shuttle, hotel shuttle, etc.)	9%	11%

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Topline – continued –

	2017 Business Flyers (2018)	2016 Business Flyers (2017)
	(n=830)	(n=894)
Limousine or car service	7%	9%
Public transit (bus, train, etc.)	6%	7%
Other	1%	1%

33. When traveling for personal reasons, assuming all of these options were available to you, which is your typical means of getting to the airport?

	2017 Personal Flyers (2018)	2016 Personal Flyers (2017)
	(n=2,152)	(n=2,180)
Personal vehicle	54%	54%
Uber or Lyft	19%	14%
Traditional taxi	7%	9%
Shared van (airport shuttle, hotel shuttle, etc.)	6%	7%
Limousine or car service	6%	5%
Public transit (bus, train, etc.)	5%	7%
Other	3%	4%

34. For any trip in 2017, did you fly from an airport that was not the closest airport to your home or office?

	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n=2,276)
Yes	38%	36%
No	62%	64%



Topline – continued –

35. Assuming you have decided to travel by air and have a choice of originating airports, how far (measured in minutes of travel time from home or work to the airport) are you willing to journey by car/bus/train for a cheaper flight?

	All Respondents (2018)
	(n=5,033)
Up to 30 minutes	27%
Up to 60 minutes	33%
Up to 90 minutes	18%
Up to 2 hours	12%
Up to 3 hours	4%
Up to 4 hours	2%
More than 4 hours	3%

36. When choosing an airport other than the one closest to your home or office, what are the most important factors for doing so? Please rank the following in order of importance, with 1 being the most important and 5 being the least important.

Base: 2017 Flyers That Chose Airport Other Than Closest (n=905)	Ticket price	Flight schedule	Airline frequent flyer program	Airport amenities	Ease of airport navigation
Rank 1	51%	22%	11%	7%	9%
Rank 2	20%	43%	12%	13%	13%
Rank 3	10%	17%	21%	20%	32%
Rank 4	9%	10%	20%	33%	28%
Rank 5	10%	8%	37%	27%	18%
Ranked 1/2	71%	65%	22%	20%	22%
Average	2.1	2.4	3.6	3.6	3.3

Base: 2016 Flyers That Chose Airport Other Than Closest (n=811)	Ticket price	Flight schedule	Airline frequent flyer program	Airport amenities	Ease of airport navigation
Rank 1	44%	25%	11%	10%	11%
Rank 2	23%	39%	11%	11%	16%

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Topline – continued –

Base: 2016 Flyers That Chose Airport Other Than Closest (n=811)	Ticket price	Flight schedule	Airline frequent flyer program	Airport amenities	Ease of airport navigation
Rank 3	13%	14%	24%	18%	33%
Rank 4	8%	13%	22%	31%	26%
Rank 5	14%	10%	31%	30%	15%

37. 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: 2017 Business Flyers (n=830)	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational reliability	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
Rank 1	25%	13%	9%	10%	7%	5%	24%	8%
Rank 2	22%	10%	9%	14%	11%	5%	20%	9%
Rank 3	14%	15%	16%	17%	10%	8%	12%	11%
Rank 4	11%	11%	16%	17%	11%	7%	10%	16%
Rank 5	8%	10%	16%	15%	14%	12%	9%	16%
Rank 6	7%	13%	14%	11%	20%	13%	8%	15%
Rank 7	8%	15%	12%	10%	16%	14%	9%	16%
Rank 8	6%	15%	8%	7%	11%	36%	8%	9%
Ranked 1/2	47%	23%	18%	23%	18%	11%	44%	16%
Average	3.40	4.65	4.50	4.21	4.93	5.90	3.63	4.81

Base: 2017 Business Flyers Who Took At Least 6 Business Trips (n=105)	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational reliability	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
Rank 1	17%	33%	9%	2%	9%	2%	22%	8%
Rank 2	25%	8%	9%	18%	10%	1%	19%	11%
Rank 3	14%	17%	20%	16%	11%	4%	13%	5%
Rank 4	13%	10%	13%	14%	15%	8%	8%	18%
Rank 5	11%	11%	19%	12%	16%	9%	6%	16%
Rank 6	7%	10%	12%	16%	19%	9%	16%	11%

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Topline – continued –

Base: 2017 Business Flyers Who Took At Least 6 Business Trips (n=105)	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational reliability	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
Rank 7	7%	6%	14%	9%	11%	19%	12%	22%
Rank 8	7%	4%	5%	14%	9%	49%	4%	10%
Ranked 1/2	42%	41%	18%	20%	18%	3%	41%	18%
Average	3.57	3.34	4.37	4.69	4.67	6.65	3.74	4.92

Base: 2016 Business Flyers (n=894)	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational reliability	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
Rank 1	24%	10%	9%	9%	8%	7%	26%	7%
Rank 2	23%	10%	12%	14%	8%	6%	15%	11%
Rank 3	12%	13%	15%	18%	11%	6%	12%	12%
Rank 4	8%	14%	15%	16%	13%	9%	10%	15%
Rank 5	8%	12%	13%	14%	15%	12%	9%	17%
Rank 6	9%	15%	14%	9%	16%	11%	9%	17%
Rank 7	7%	12%	12%	11%	19%	17%	10%	13%
Rank 8	9%	15%	10%	8%	11%	31%	8%	9%

38. 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: 2017 Personal Flyers (n=2,152)	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational reliability	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
Rank 1	19%	8%	6%	7%	4%	3%	49%	4%
Rank 2	34%	10%	9%	11%	5%	3%	20%	8%
Rank 3	16%	14%	15%	21%	9%	4%	9%	11%
Rank 4	9%	9%	20%	19%	12%	7%	5%	18%
Rank 5	7%	9%	18%	15%	17%	8%	5%	19%
Rank 6	6%	11%	16%	13%	20%	12%	4%	18%
Rank 7	5%	16%	10%	9%	20%	21%	4%	16%

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Topline – continued –

Base: 2017 Personal Flyers (n=2,152)	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational reliability	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
Rank 8	4%	23%	5%	5%	12%	41%	4%	6%
Ranked 1/2	53%	17%	15%	18%	10%	6%	69%	12%
Average	3.09	5.15	4.49	4.22	5.32	6.39	2.47	4.87

Base: 2017 Personal Flyers Who Took At Least One Personal Leisure Trip (n=1,996)	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational reliability	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
Rank 1	19%	8%	6%	7%	4%	4%	49%	5%
Rank 2	34%	9%	9%	12%	5%	3%	19%	8%
Rank 3	16%	14%	15%	21%	9%	5%	8%	12%
Rank 4	9%	9%	20%	19%	13%	8%	6%	18%
Rank 5	8%	10%	18%	15%	16%	9%	5%	19%
Rank 6	6%	11%	17%	13%	20%	13%	4%	17%
Rank 7	5%	16%	10%	9%	20%	21%	4%	15%
Rank 8	4%	24%	6%	5%	12%	38%	5%	6%
Ranked 1/2	53%	17%	15%	18%	9%	7%	68%	13%
Average	3.12	5.19	4.54	4.22	5.32	6.28	2.50	4.82

Base: 2016 Personal Flyers (n=2,180)	Flight schedule	Airline frequent flyer program	Airline seat comfort	Operational reliability	Quality of inflight amenities	Environmental responsibility	Affordability	Customer service
Rank 1	19%	7%	7%	7%	5%	4%	46%	4%
Rank 2	32%	9%	11%	11%	6%	4%	19%	8%
Rank 3	14%	15%	16%	19%	10%	6%	9%	11%
Rank 4	10%	11%	17%	19%	14%	6%	6%	16%
Rank 5	7%	12%	16%	16%	17%	8%	5%	19%
Rank 6	8%	11%	16%	13%	18%	12%	5%	17%
Rank 7	5%	15%	10%	9%	19%	19%	5%	17%
Rank 8	5%	19%	7%	5%	11%	41%	4%	7%

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Topline – continued –

39. Thinking about your overall experience with air travel in 2017, how satisfied or dissatisfied are you?

	2017 Flyers (2018)	2016 Flyers (2017)	2015 Flyers (2016)
	(n=2,262)	(n=2,276)	(n=1,261)
5 - Very satisfied	37%	43%	35%
4 - Somewhat satisfied	44%	42%	44%
3 – Neutral	13%	10%	14%
2 – Somewhat dissatisfied	4%	5%	5%
1 – Very dissatisfied	1%	1%	1%
Very/Somewhat Satisfied	81%	85%	80%
Very/Somewhat Dissatisfied	5%	6%	6%

	2017 Flyers with Global Entry or PreCheck	2017 Flyers NOT Enrolled in Global Entry/ TSA PreCheck
	(n=813)	(n=1,449)
5 - Very satisfied	49%	30%
4 - Somewhat satisfied	36%	49%
3 – Neutral	9%	16%
2 – Somewhat dissatisfied	4%	4%
1 – Very dissatisfied	1%	1%
Very/Somewhat Satisfied	86%	79%
Very/Somewhat Dissatisfied	5%	6%

40. Of all the flights you took in 2017, what amount were satisfactory to you?

	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n=2,276)
All were satisfactory	43%	48%
Most were satisfactory	42%	39%

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Topline – continued –

	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n=2,276)
About half and half	12%	10%
Most were unsatisfactory	2%	2%
All were unsatisfactory	1%	0%
All/Most Satisfactory	85%	87%
All/Most Unsatisfactory	3%	3%

41. When it comes to traveling by air, 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: 2018 Respondents Who Have Flown on Airline Before (n=4,391)	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 upon arrival
Rank 1	18%	10%	34%	8%	19%	11%
Rank 2	12%	16%	21%	15%	17%	18%
Rank 3	14%	17%	16%	18%	18%	18%
Rank 4	13%	18%	12%	20%	19%	18%
Rank 5	16%	21%	9%	21%	16%	17%
Rank 6	27%	18%	8%	18%	11%	18%
Ranked 1/2	30%	26%	55%	23%	37%	29%
Average	3.8	3.8	2.7	3.8	3.3	3.7

Base: 2017 All Respondents (n= 5,047)	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 upon arrival
Rank 1	17%	10%	34%	9%	18%	13%
Rank 2	13%	17%	19%	16%	18%	17%
Rank 3	12%	18%	16%	17%	19%	18%
Rank 4	13%	18%	13%	21%	18%	17%

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Topline – continued –

Base: 2017 All Respondents (n= 5,047)	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 upon arrival
Rank 5	16%	21%	11%	21%	16%	17%
Rank 6	30%	17%	8%	15%	12%	19%
Ranked 1/2	30%	27%	53%	25%	36%	30%

42. In 2017, on a scale of 1 to 5, how would you rate your overall satisfaction with each of the following?

Base: 2017 Flyers (n=2,262)	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 upon arrival
5 - Very satisfied	28%	35%	21%	24%	24%	20%
4 - Somewhat satisfied	43%	42%	39%	43%	43%	38%
3 – Neutral	21%	17%	23%	22%	20%	26%
2 – Somewhat dissatisfied	7%	5%	14%	9%	10%	13%
1 – Very dissatisfied	1%	1%	3%	2%	2%	3%
Very/Somewhat Satisfied	71%	77%	60%	67%	67%	58%
Very/Somewhat Dissatisfied	8%	5%	17%	11%	13%	16%
Mean	3.89	4.07	3.60	3.79	3.76	3.59

Base: 2016 Flyers (n=2,276)	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 upon arrival
5 - Very satisfied	31%	32%	20%	24%	23%	21%
4 - Somewhat satisfied	37%	39%	31%	37%	38%	31%
3 – Neither	25%	23%	29%	28%	27%	33%
2 – Somewhat dissatisfied	5%	6%	12%	9%	9%	11%
1 – Very dissatisfied	2%	1%	7%	3%	3%	4%

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Topline – continued –

43. At any point in 2017, did you submit a formal/written complaint to the U.S. Department Transportation (DOT) about a U.S.-based airline? *(Please note that trended results for this question are not directly comparable due to changes in how the question was asked)*

	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n= 2,276)
Yes	14%	12%
No	86%	88%

44. At any point in 2017, did you submit a formal/written complaint directly to a U.S.-based airline? *(Please note that trended results for this question are not directly comparable due to changes in how the question was asked)*

	2017 Flyers (2018)	2016 Flyers (2017)
	(n=2,262)	(n=2,276)
Yes	14%	15%
No	86%	85%

45. Did the airline address your complaint satisfactorily?

	Flyers who Submitted Complaint to Airline in 2017	Flyers who Submitted Complaint to Airline in 2016
	(n=330)	(n= 354)
Yes	74%	81%
No	26%	19%



Topline – continued –

46. Do you have an adaptive need that makes your experience different than that of other air travelers? Please select all that apply.

	All Respondents 2018	All Respondents 2017
	(n=5,033)	(n= 5,047)
Mobility-related adaptive need (e.g., wheelchair)	9%	12%
Sensory-related adaptive need (e.g., vision impairment)	4%	8%
Other	4%	4%
None of the above	84%	79%

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