



Ipsos Public Affairs
The Social Research and Corporate Reputation Specialists

Status of Air Travel in the USA

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Airlines for America®

We Connect the World



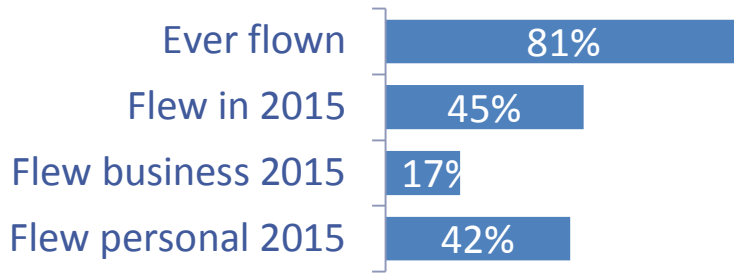
Airlines for America: Research Objectives

- Airlines for America® (A4A) sought to better understand various aspects of the American airline traveler in 2015:
 - ⇒ Who is traveling by air, why, where and how often;
 - ⇒ How many Americans traveled by airline in 2015;
 - ⇒ What logistical decisions did 2015 travelers make including how much luggage to take, how many nights to stay, what kind of tickets they buy;
 - ⇒ What are their upcoming travel plans in 2016; and
 - ⇒ What are the investments that travelers believe are the most crucial in the coming years.

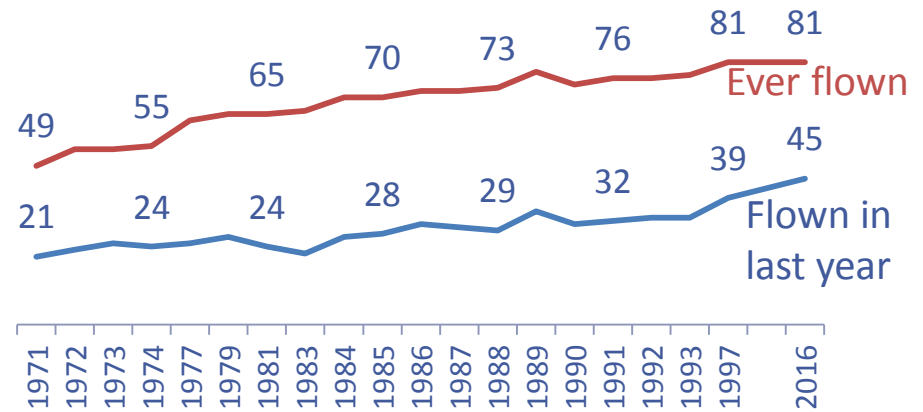
- *This study references similar research conducted by Gallup on behalf of the Air Transport Association of America in 1998 for trending purposes. The 1997 study was a random sample of 3,016 Americans age 18+ conducted via telephone.*

Executive Summary

Airline Travel 2015 % of US Adult Population

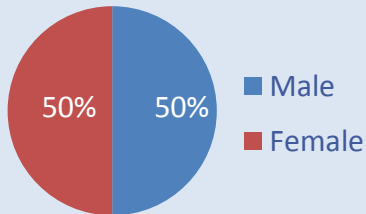


Airline Travel 1971-2015 % of US Adult Population

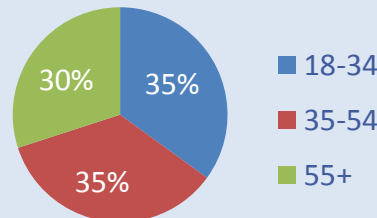


The 2015 American Adult Flyer at a Glance

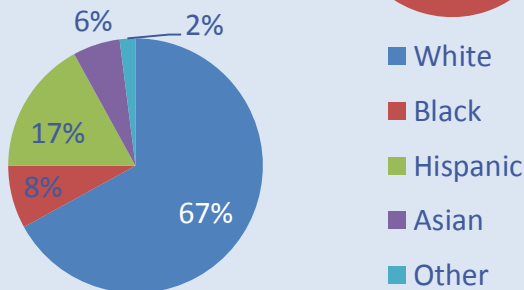
Gender



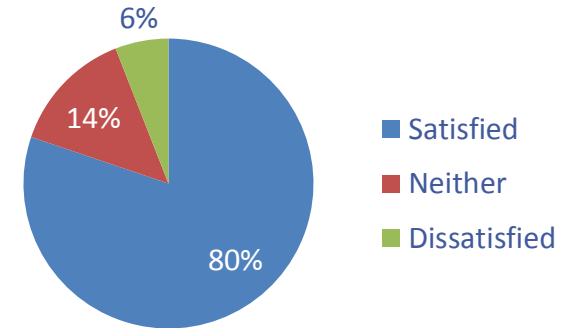
Age



Race/Ethnicity



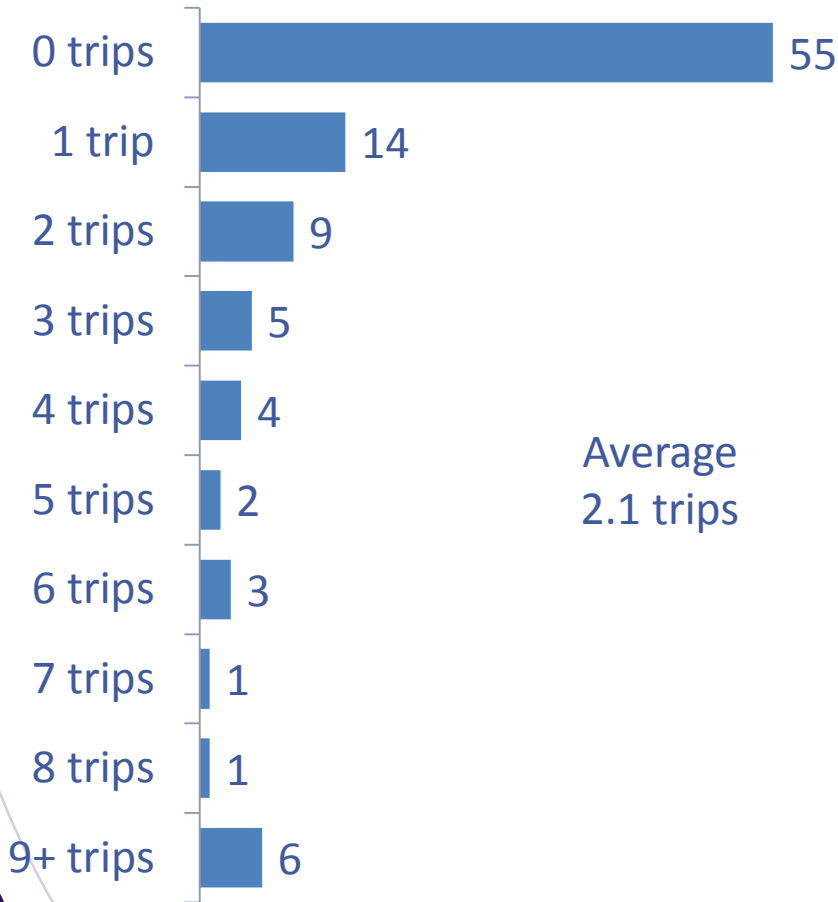
2015 Flyer Satisfaction



Trips per Airline Traveler

All American Adults

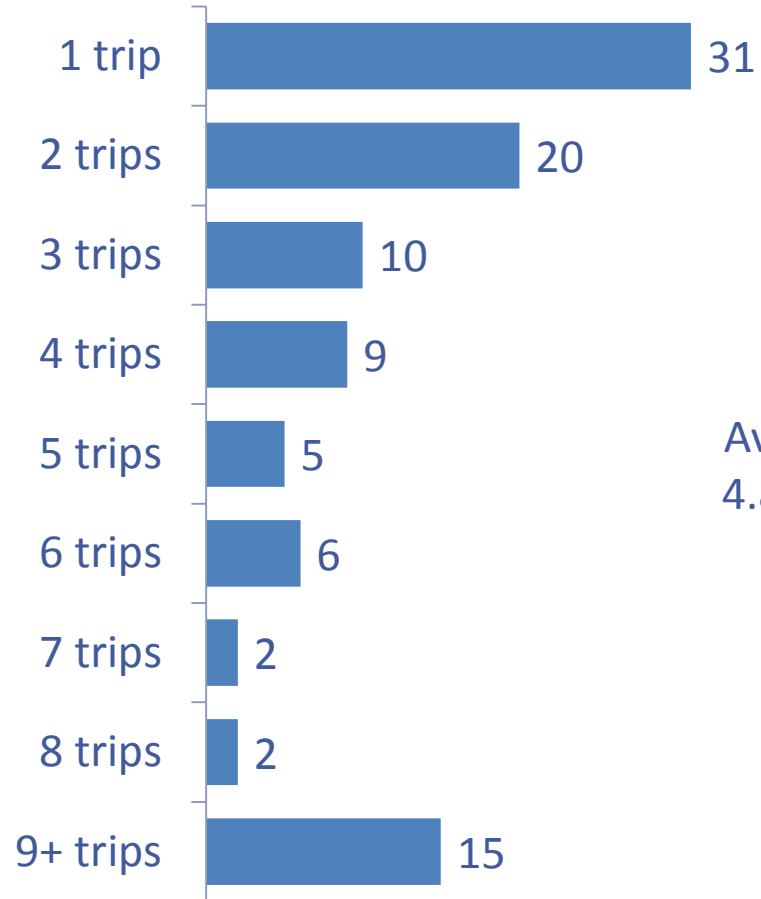
% of all Americans take X trips



Average
2.1 trips

2015 Airline Travelers

% of all 2015 flyers take X trips

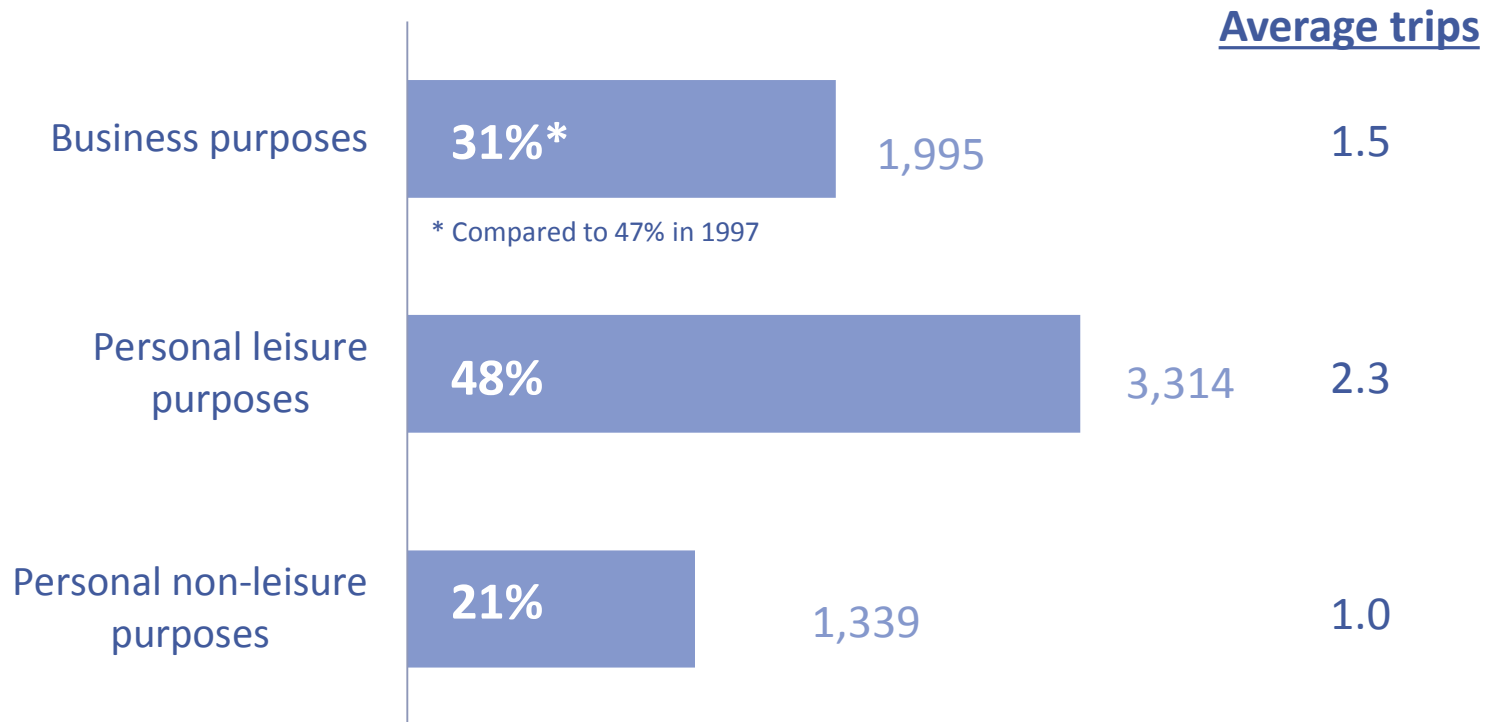


Average
4.8 trips

Q3. In 2015, how many trips did you take on airlines for the following purposes?
Count each roundtrip as a single trip and include any trips planned for the last few weeks of 2015

People took flights for many reasons in 2015

Total Trips Taken 2015 Airline Travelers

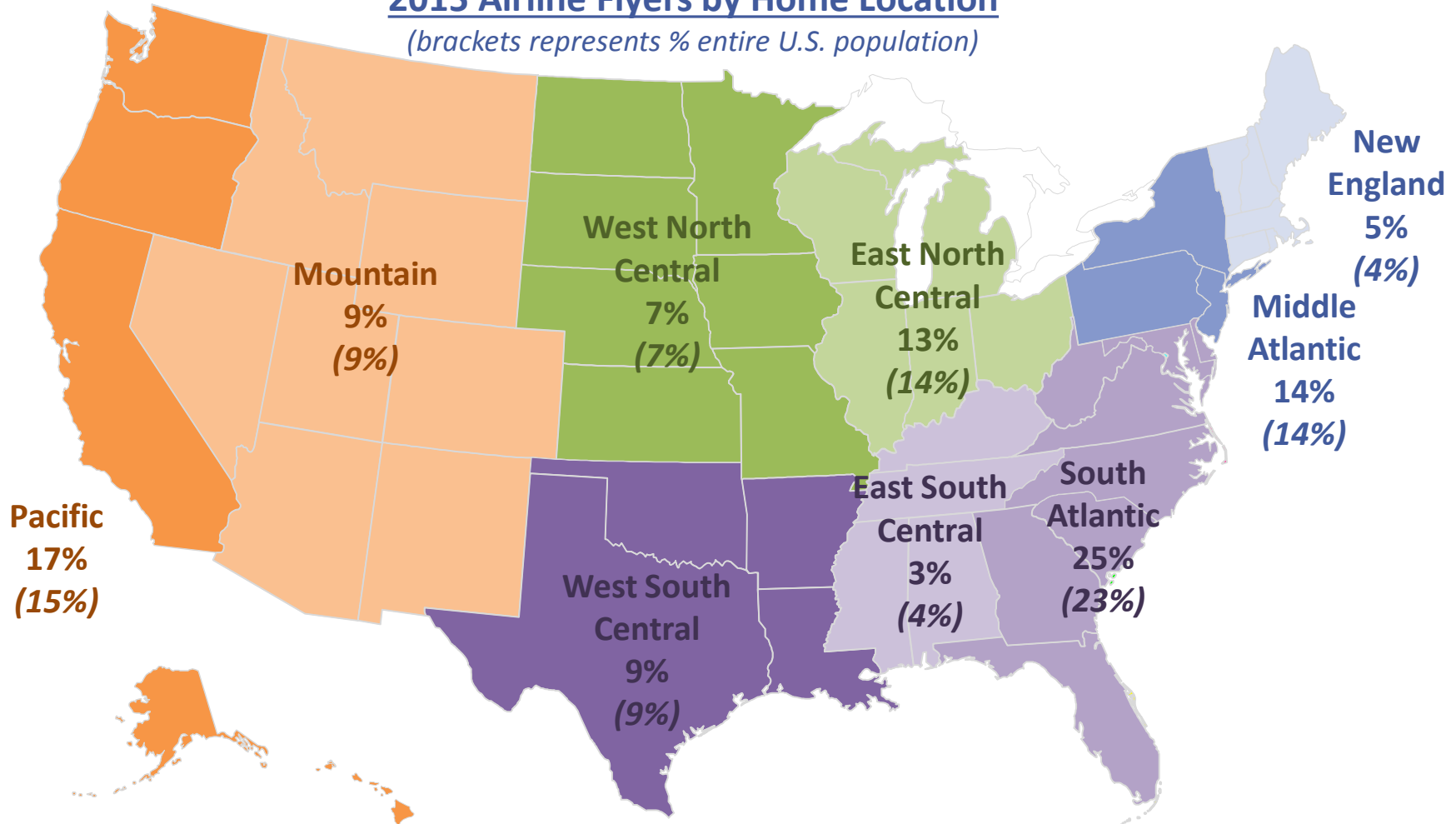


Q3. In 2015, how many trips did you take on airlines for the following purposes? Count each roundtrip as a single trip and include any trips planned for the last few weeks of 2015

2015 Flyers Come From Across the United States

2015 Airline Flyers by Home Location

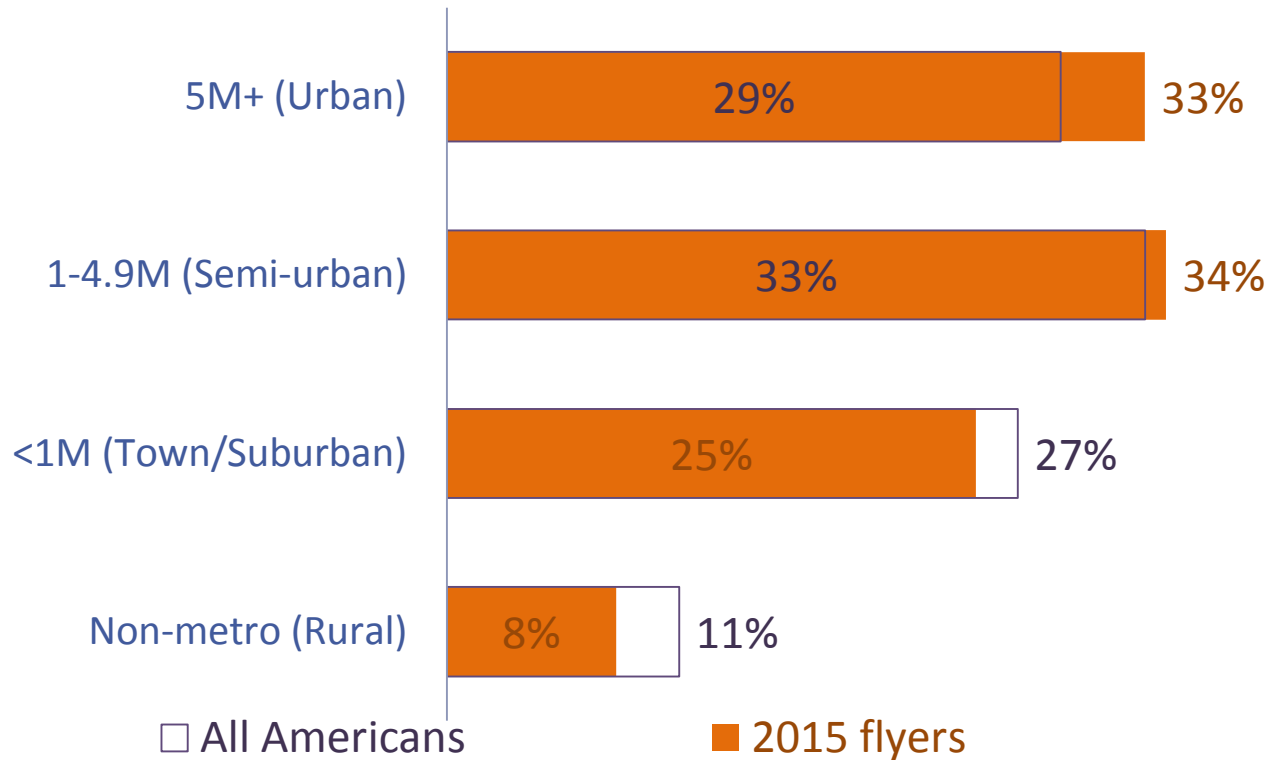
(brackets represents % entire U.S. population)



2015 Flyers Come from Urban and Rural Areas

2015 Airline Flyers by Home Population

(outline represents % entire U.S. population)



For Americans Airline Travel is Mostly Domestic

Individual/Personal Travel to Region

2015 Airline Travelers – Personal Reasons

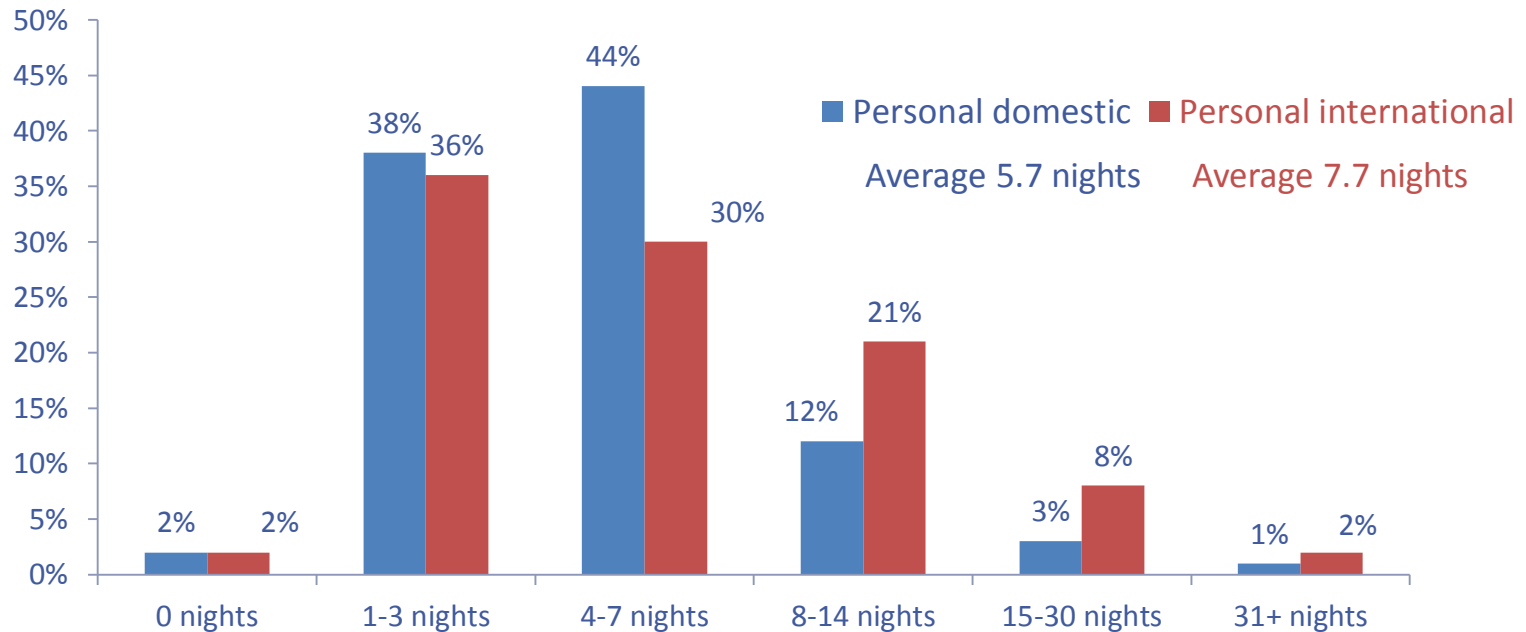
Region	% of all Trips
USA	63%
Canada	5%
Mexico	5%
Central America	5%
South America	4%
Caribbean	5%
Europe	8%
Africa	2%
Middle East	2%
Australia/Asia	3%

} Latin ≥ 14%

Trip Duration

- Most personal trips last less than one week.
- The average across domestic and international is 6.6 nights.

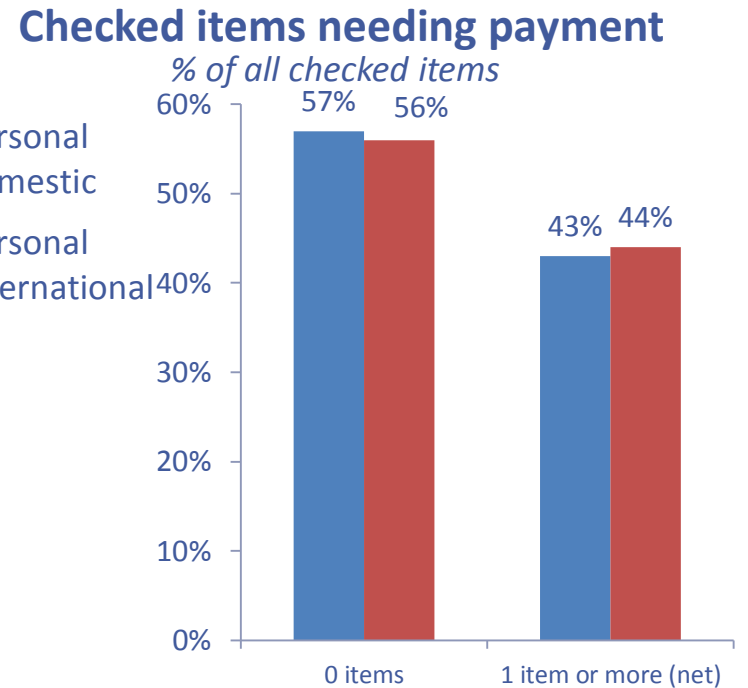
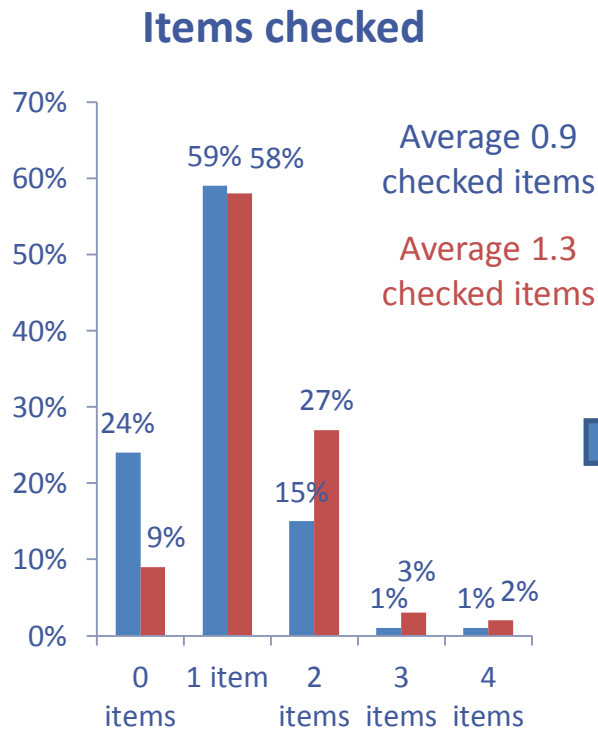
How many nights stayed?



Q7. On average, how many nights did you stay at your destination when you took the following types of trips?/Q8. When you travel via airline on personal trips, how many people do you usually travel with?

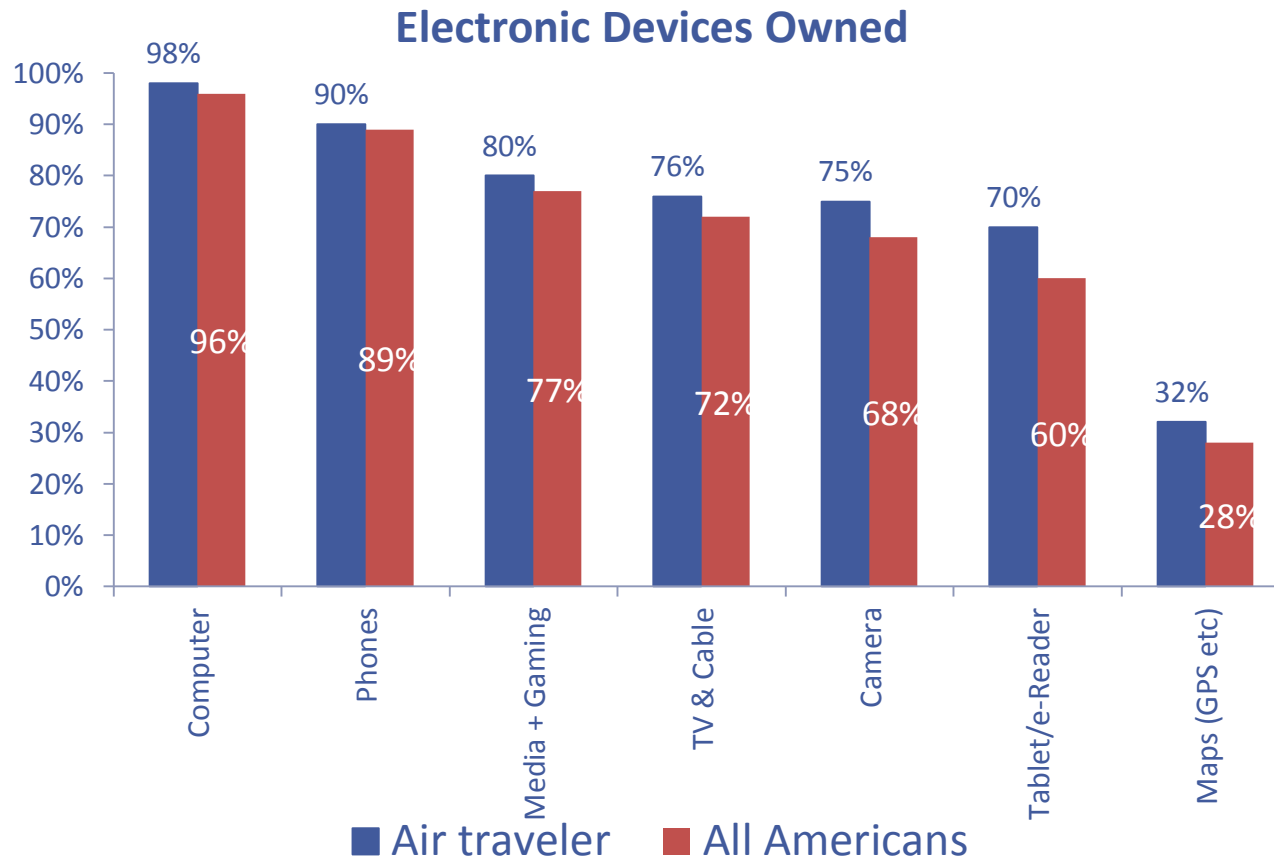
Travelers Checked Baggage Experience

- Travelers going to an international location are likely to check more items than those traveling domestically.
 - Personal travelers check an average 1.1 pieces of luggage.
 - Of all personal checked bags in 2015, more than half did not require payment.



Electronic Devices Owned

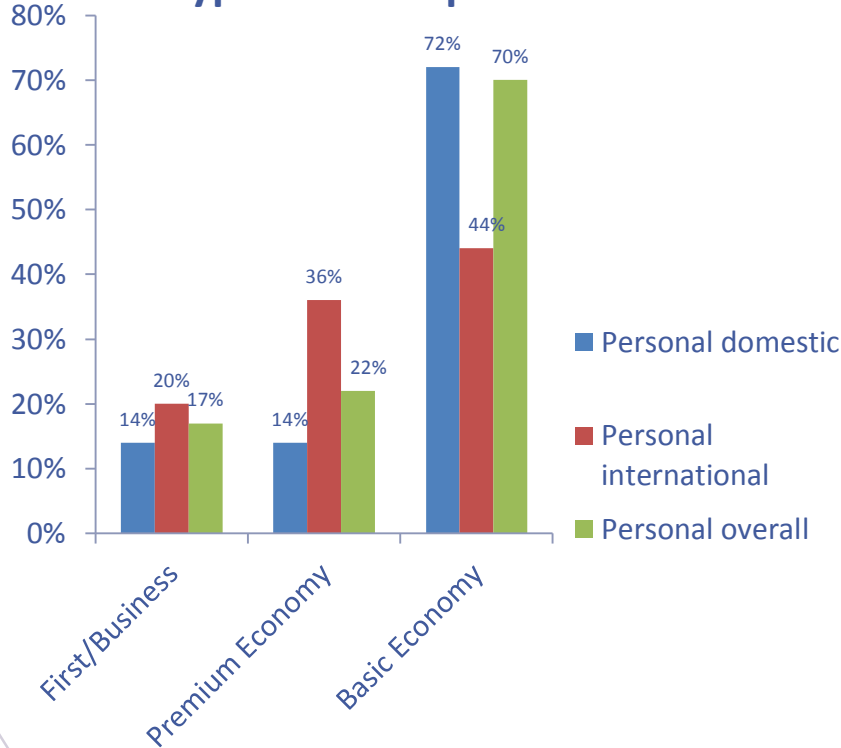
- Air travelers are a tech-savvy group: nearly all travelers own some type of computer.
- Smartphones are also popular: more than three-quarters of flyers own a smartphone.
- 70% of flyers own a tablet or e-Reader, vs. 60% for the overall population



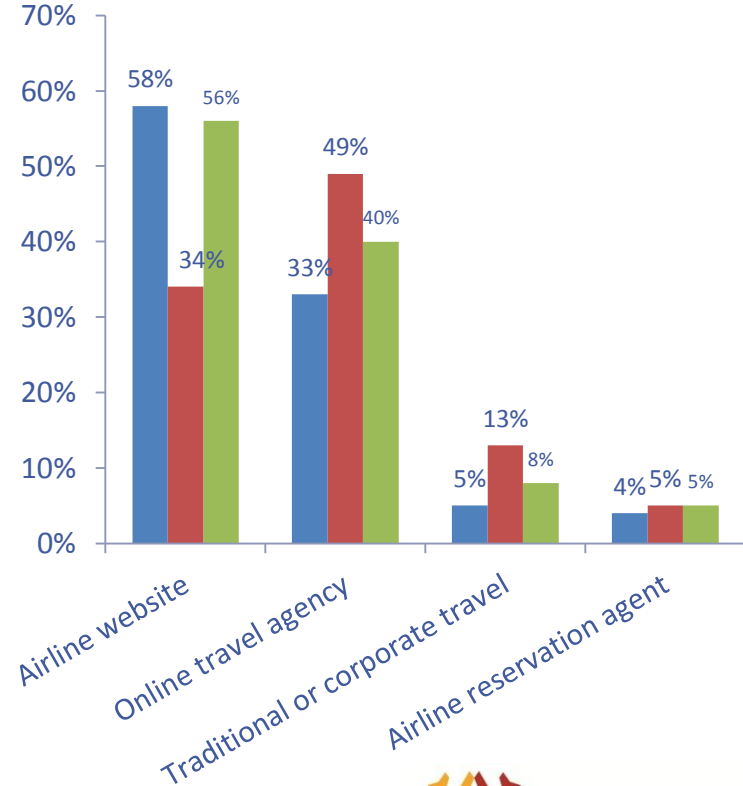
Booking tickets (what kind and where) for travelers

- Personal international travelers are twice as likely to splurge on premium seating as those traveling domestically. [56% vs. 28%]
- Those flying internationally are more likely to book travel from an online travel agency, whereas most domestic travel was booked directly through the airline website.

Type of ticket purchased



How ticket booked

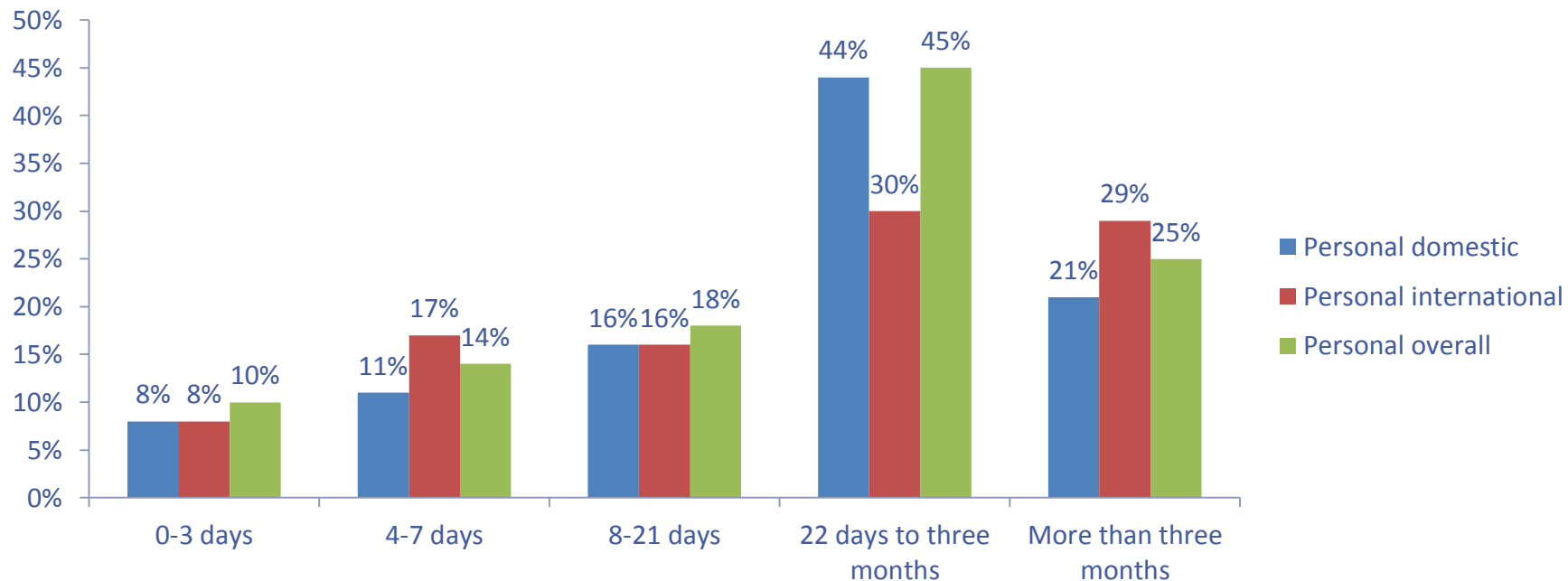


Q12. What type of ticket do you (or your company) usually book for these kinds of flights? / Q14. What resource do you usually use to book travel for these kinds of flights?

Booking tickets (how far in advance) for travelers

- The majority of personal domestic and international travelers book their tickets more than three weeks in advance of the date of departure. [65%, 59%]

Booking tickets in advance

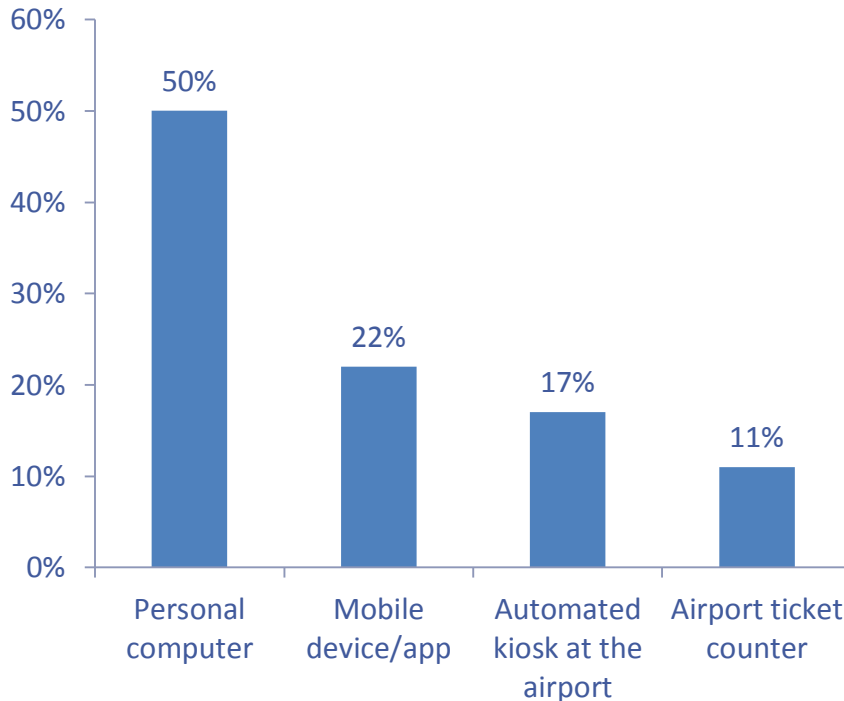




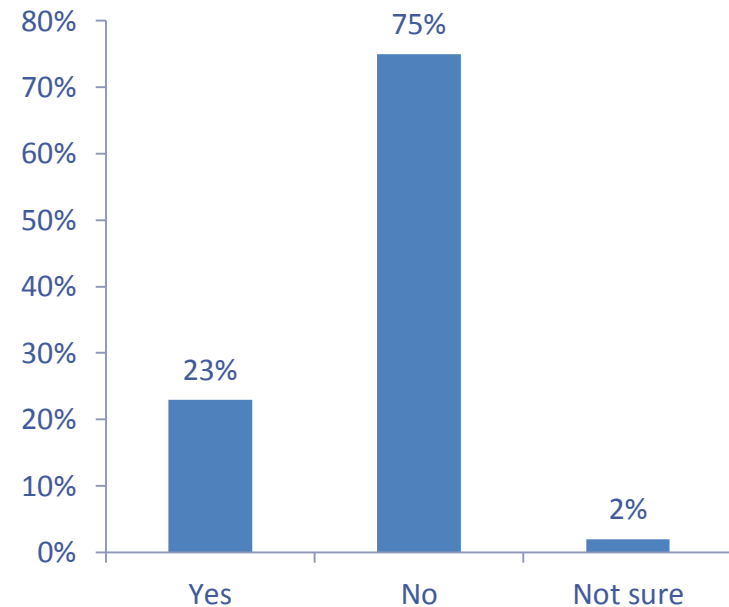
The check-in and upgrade process for flyers

- Most travelers prefer to check in to their flights on a personal device, using either a personal computer or mobile device. Only 11% use the ticket counter.
- 23% of air travelers chose to purchase a seat upgrade in 2015.

Check-In Method



Purchased seat upgrade

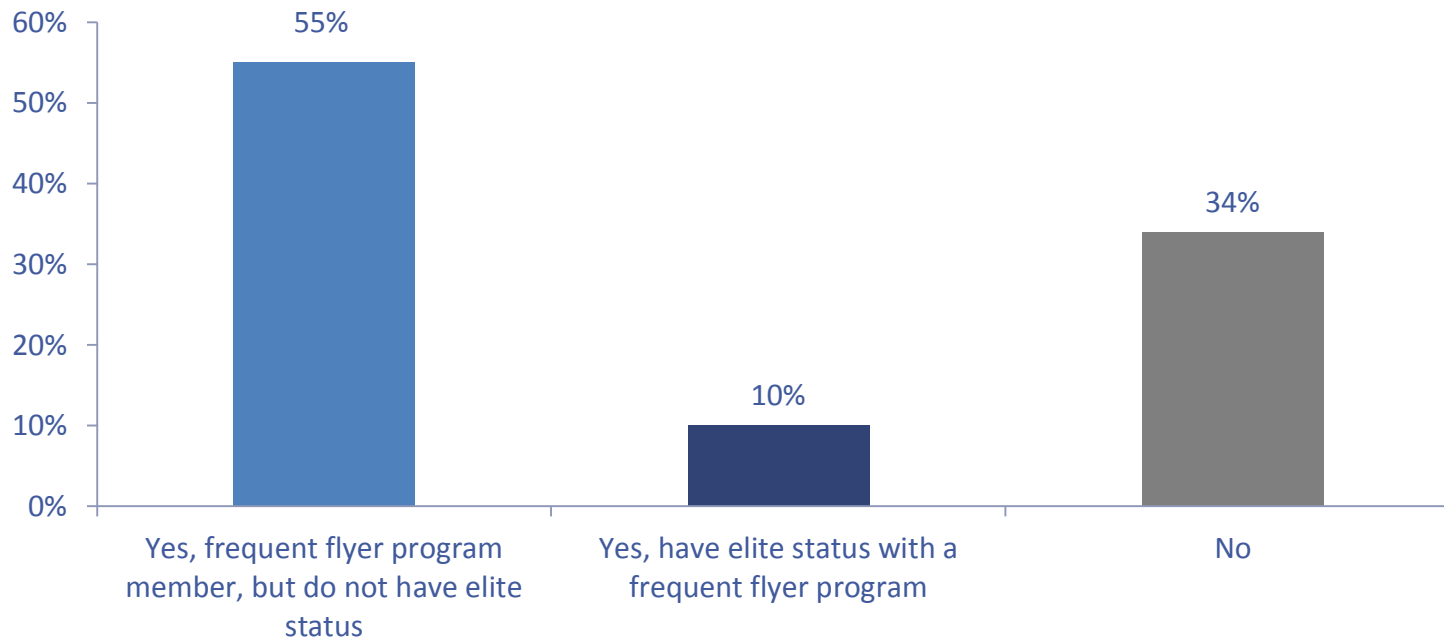


Q15. What type of ticket do you (or your company) usually book for these kinds of flights? / Q16. Did you purchase a seat upgrade using money, points or miles on any flight?

Frequent Flyer Programs for travelers

- Two-thirds of 2015 flyers are a member of some airline frequent flyer program.

Enrollment in frequent flyer programs

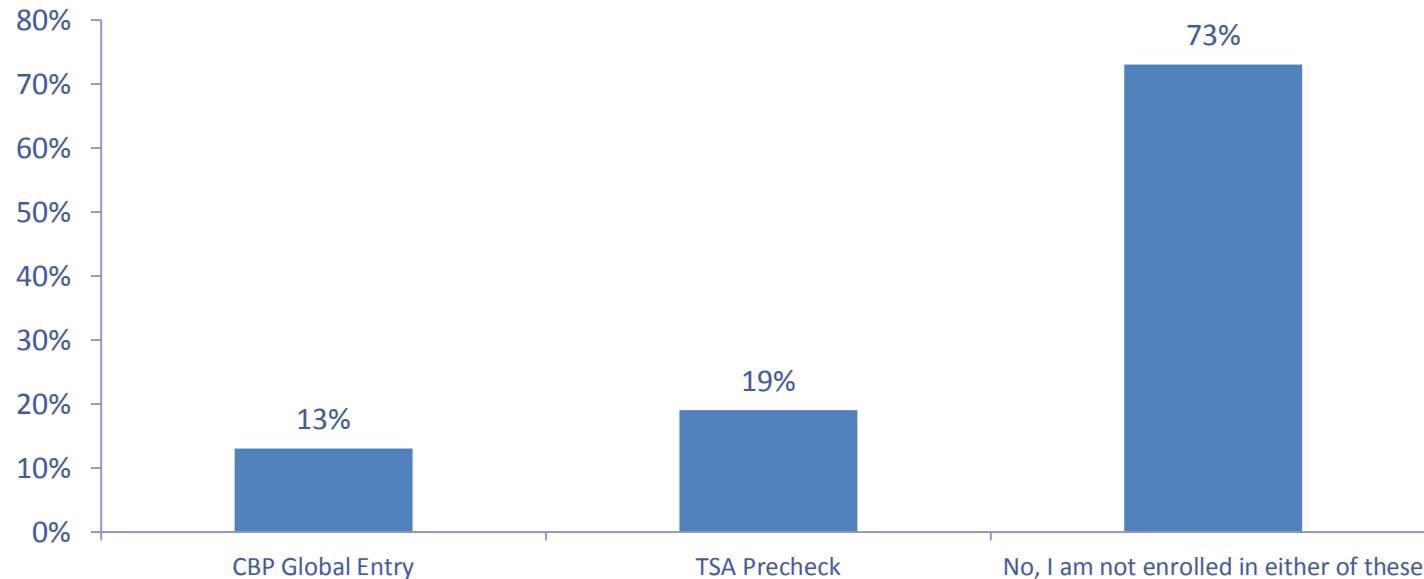


Q17. Are you currently enrolled in any frequent flyer program and do you have any status giving you extra privileges?

TSA Pre-Check and future enrollment for travelers

- Nearly a fifth (19%) of travelers are enrolled in the TSA PreCheck security program.
- Only 13% are enrolled in CBP Global Entry.

Enrollment in security programs



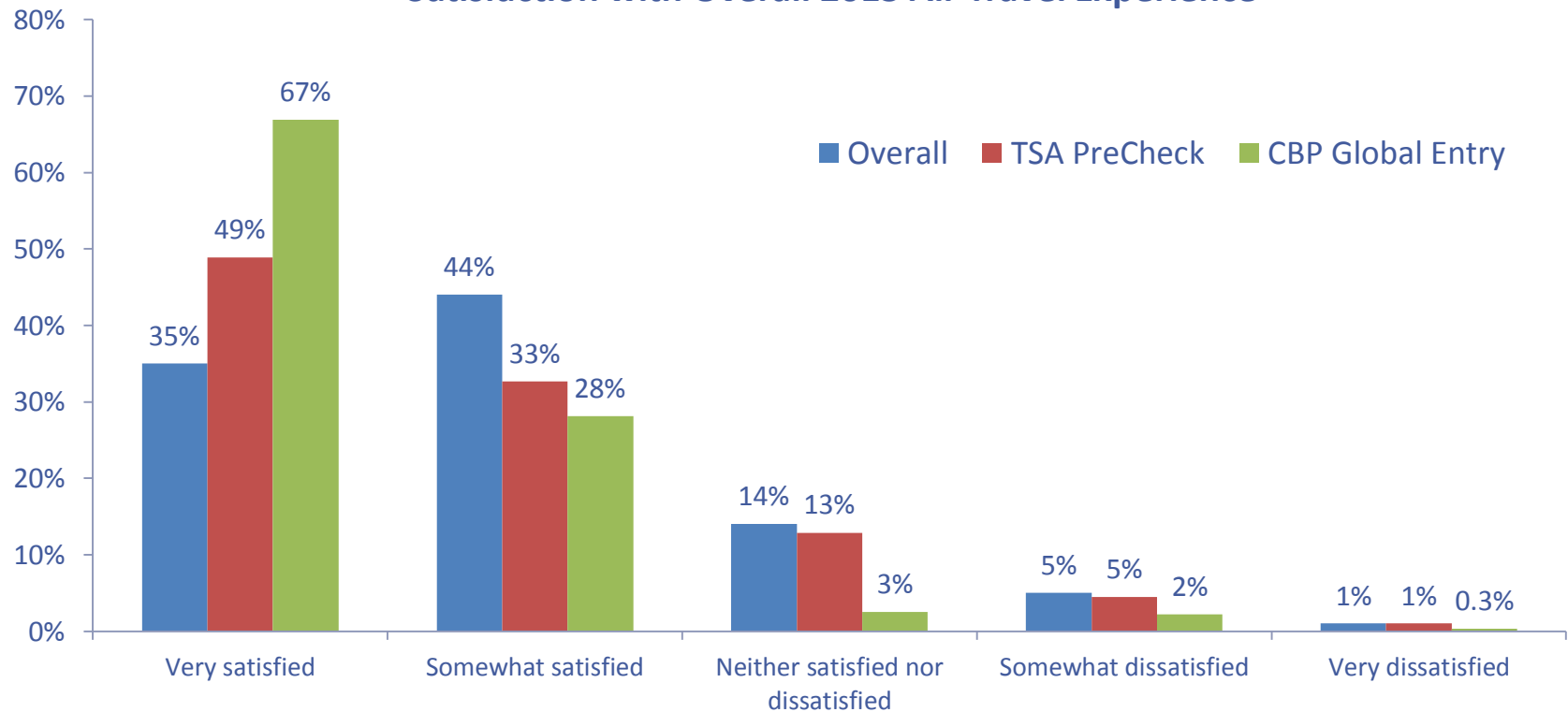
Base: N = 1364

Q18. Are you currently enrolled in either of these expedited security screening programs?/ Q19. Do you plan to enroll in either of these expedited security screening programs in 2016?

2015 Air Traveler Satisfaction

- 80% of all 2015 flyers reported being somewhat or very satisfied with their overall air travel experience in 2015, including 35% very satisfied and 1% very dissatisfied.
- Flyers enrolled in expedited security screening programs reported even greater levels of satisfaction: 82% (49% very) for PreCheck; 95% (67% very) for Global Entry.

Satisfaction with Overall 2015 Air Travel Experience

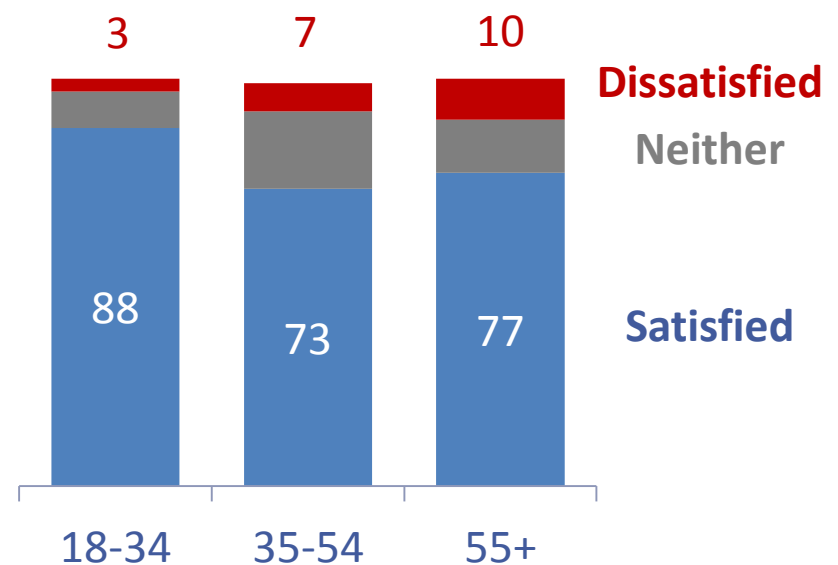
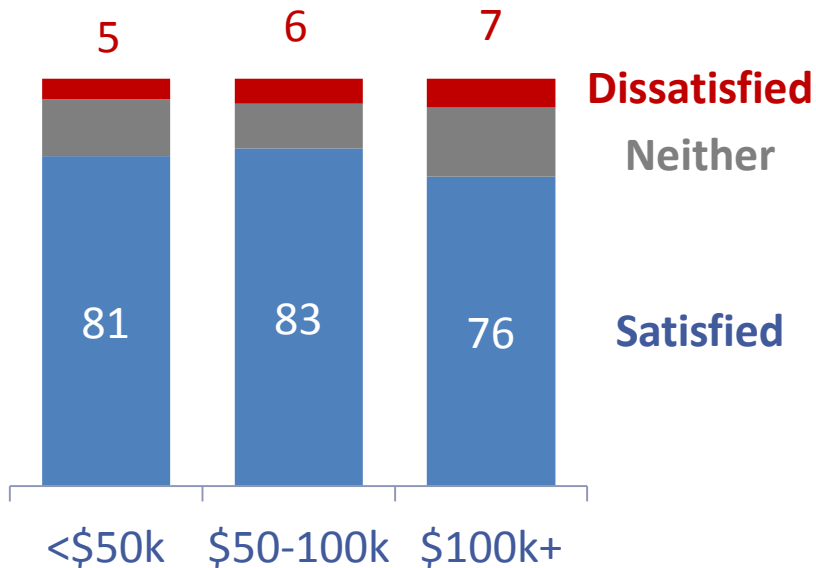


2015 Air Traveler Satisfaction (Cont'd)

- While air travelers of all incomes and age groups reported satisfaction levels exceeding 70%, younger [88%] and middle class travelers [83%] reported the highest levels of satisfaction their 2015 air travel experience.

Satisfaction % by Traveler HH Income

Satisfaction % by Age of Traveler

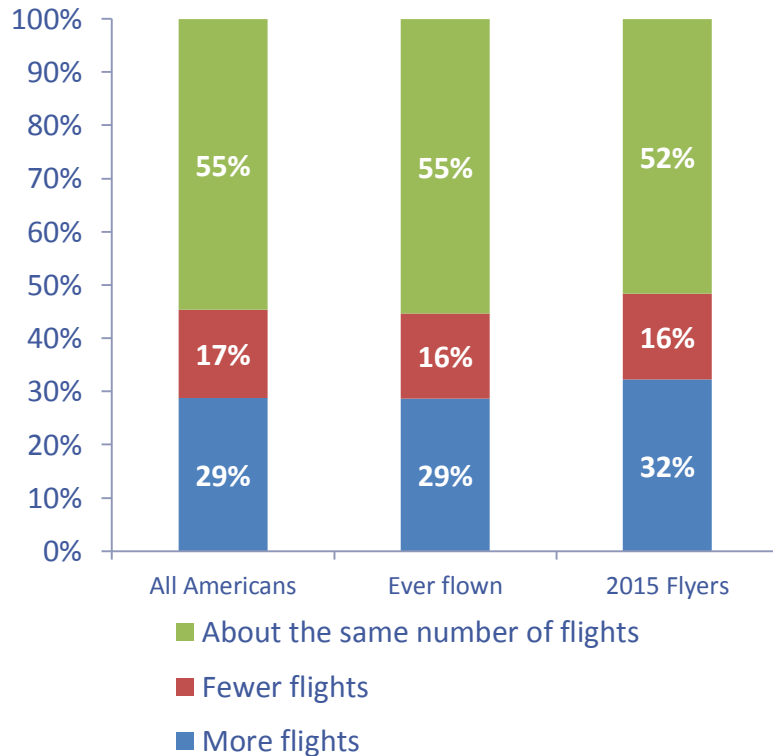


Prospective- Flight in 2016

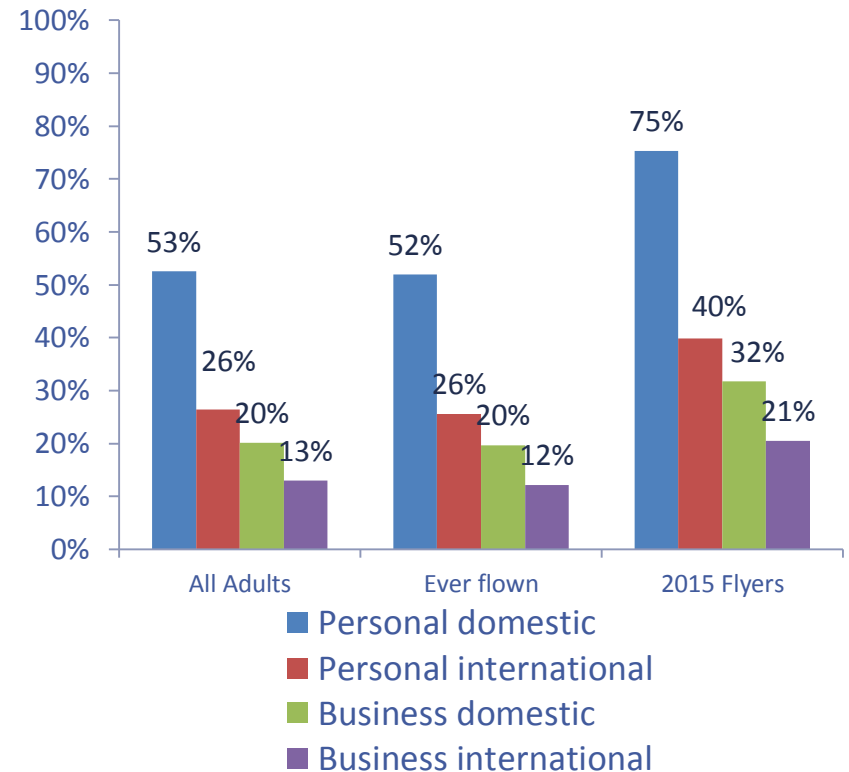
2016 Flight Outlook

- Americans generally plan to take about the same number of flights next year.
- 2015 travelers are the most likely to fly again in 2016 – and to take even more flights, with the most popular type of trip being personal domestic trips.

More or less flights in 2016



Purpose and Destination for Likely Flyers



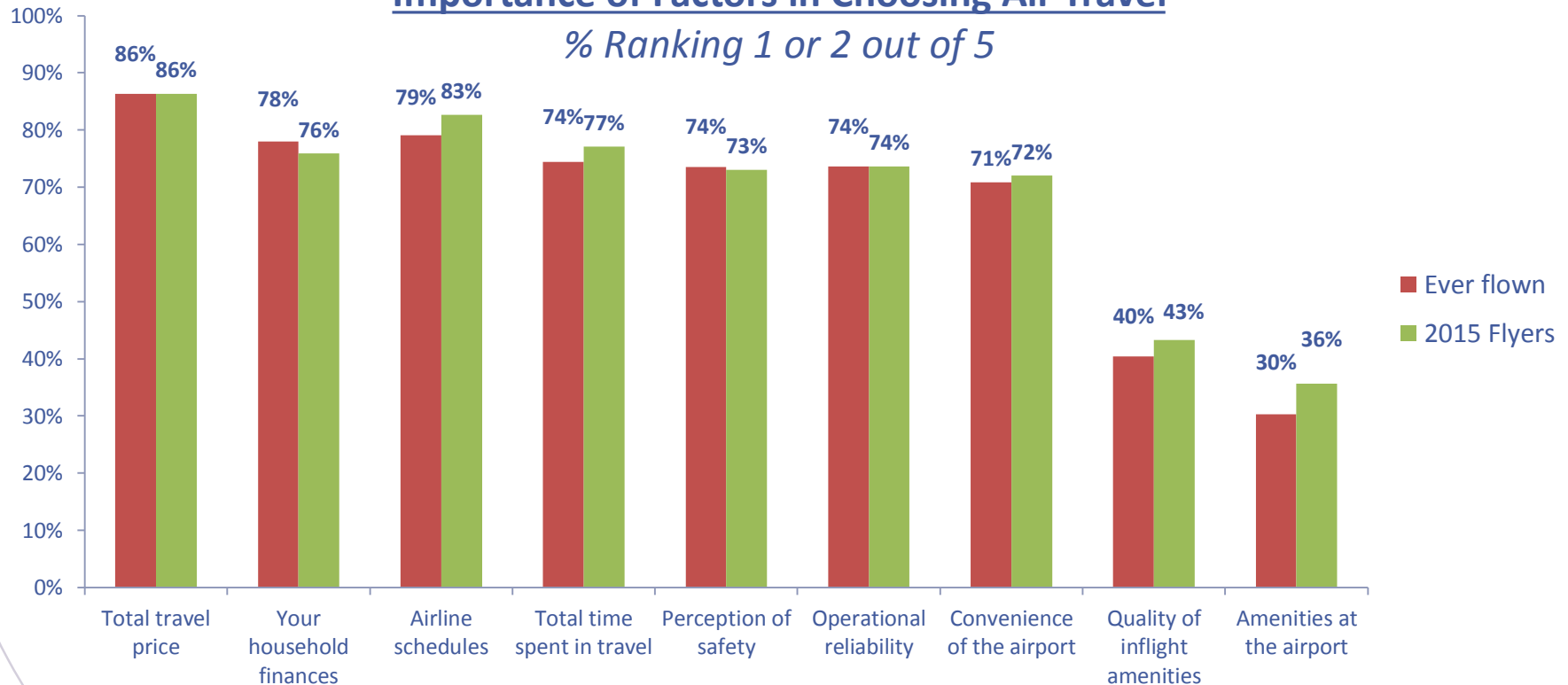
Q21. In total, do you think you will take more or fewer flights in 2016 than you did in 2015?/Q20. How likely are you to travel by airline for these reasons and destinations?

Travel Decision Factors

- The cost and the time spent traveling are the most important factors in deciding whether to travel by air.
- Airport amenities have the least effect on decision making.

Importance of Factors in Choosing Air Travel

% Ranking 1 or 2 out of 5



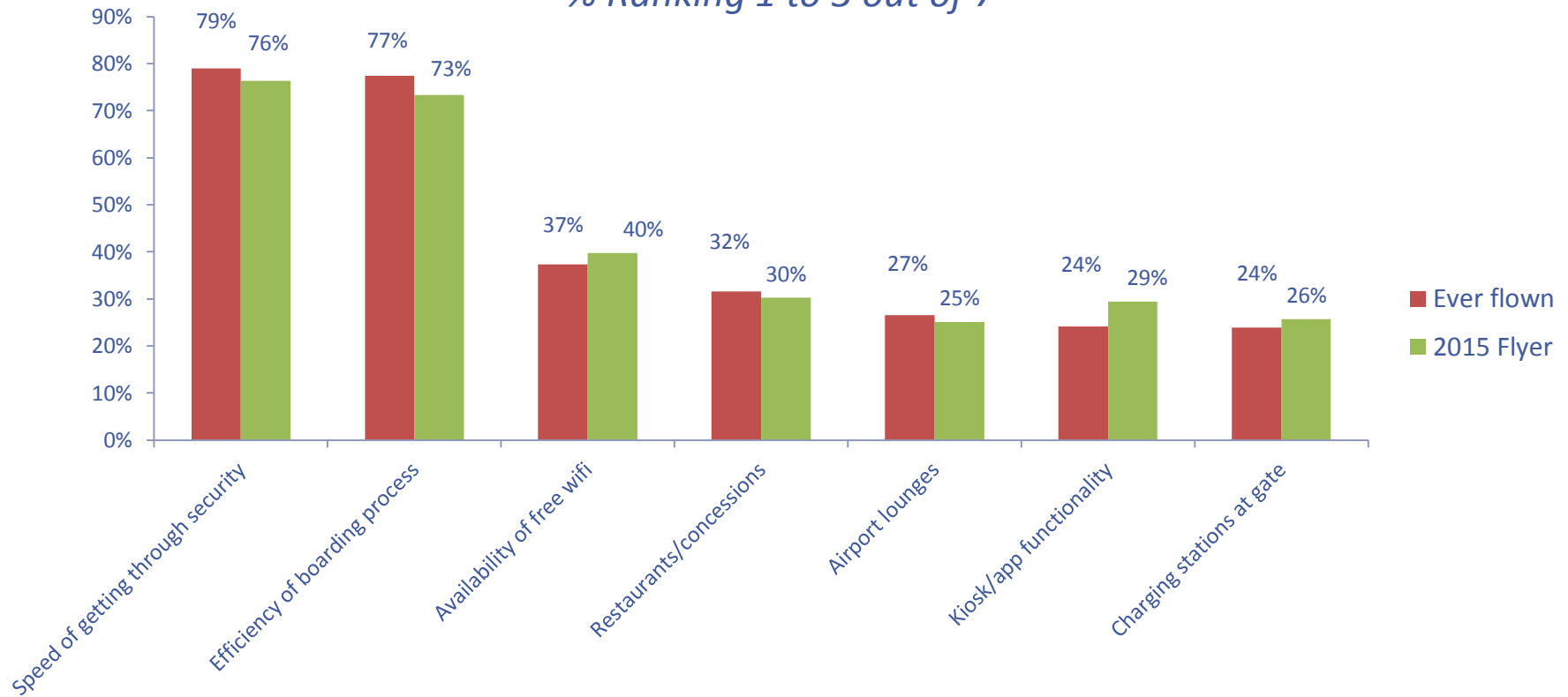
Q22. How important are each of the following when you are making the decision to travel by airline (versus another mode of travel or versus not going at all)?

Importance of pre-flight factors

- Efficiency in the preflight experience is the most important factor for travelers, with efficiency in the security and boarding process ranked as most important preflight factors.

Importance of Pre-Flight Factors

% Ranking 1 to 3 out of 7



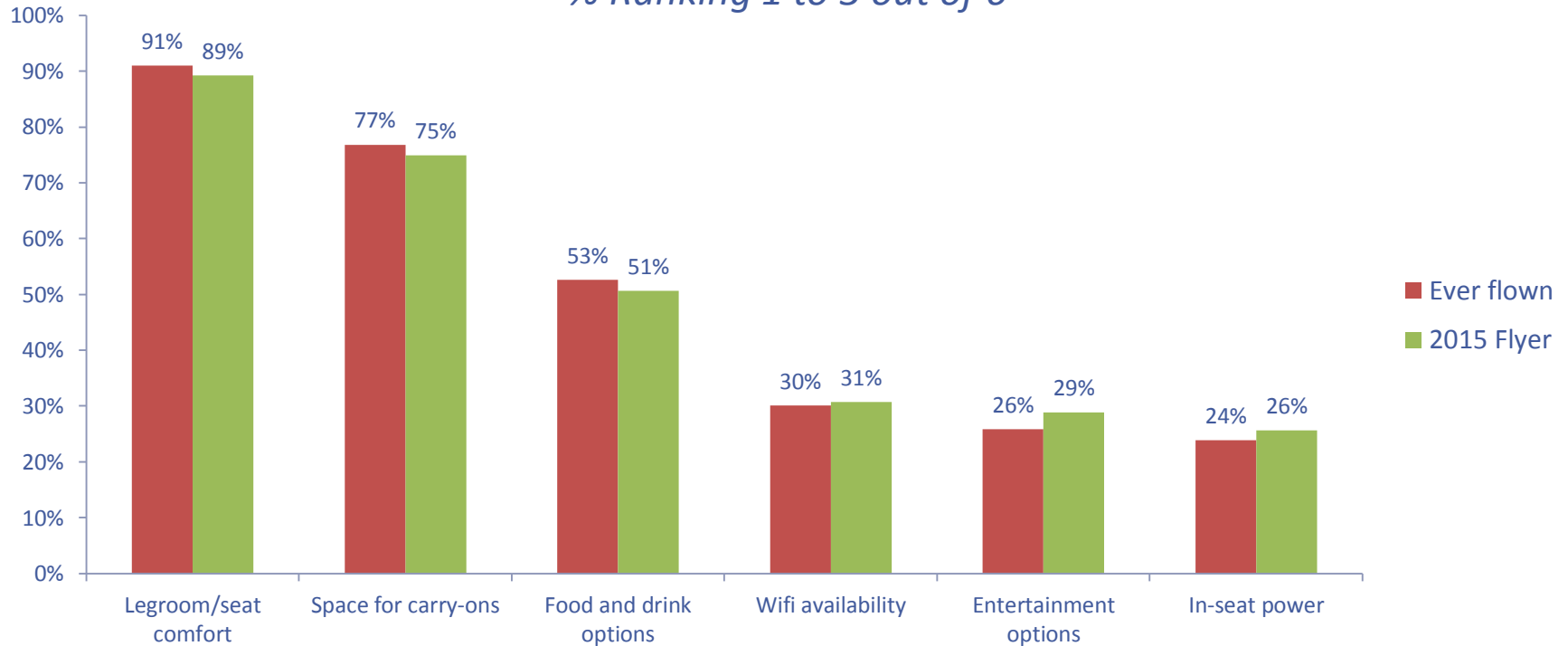
Q23. In terms of your **preflight** experience at the airport, how would you RANK the following in importance?

Importance of inflight factors

- Space for both the travelers and their luggage is the most important factor for an inflight experience.
- 2015 travelers value inflight entertainment options more than people who have ever flown.

Importance of In-Flight Factors

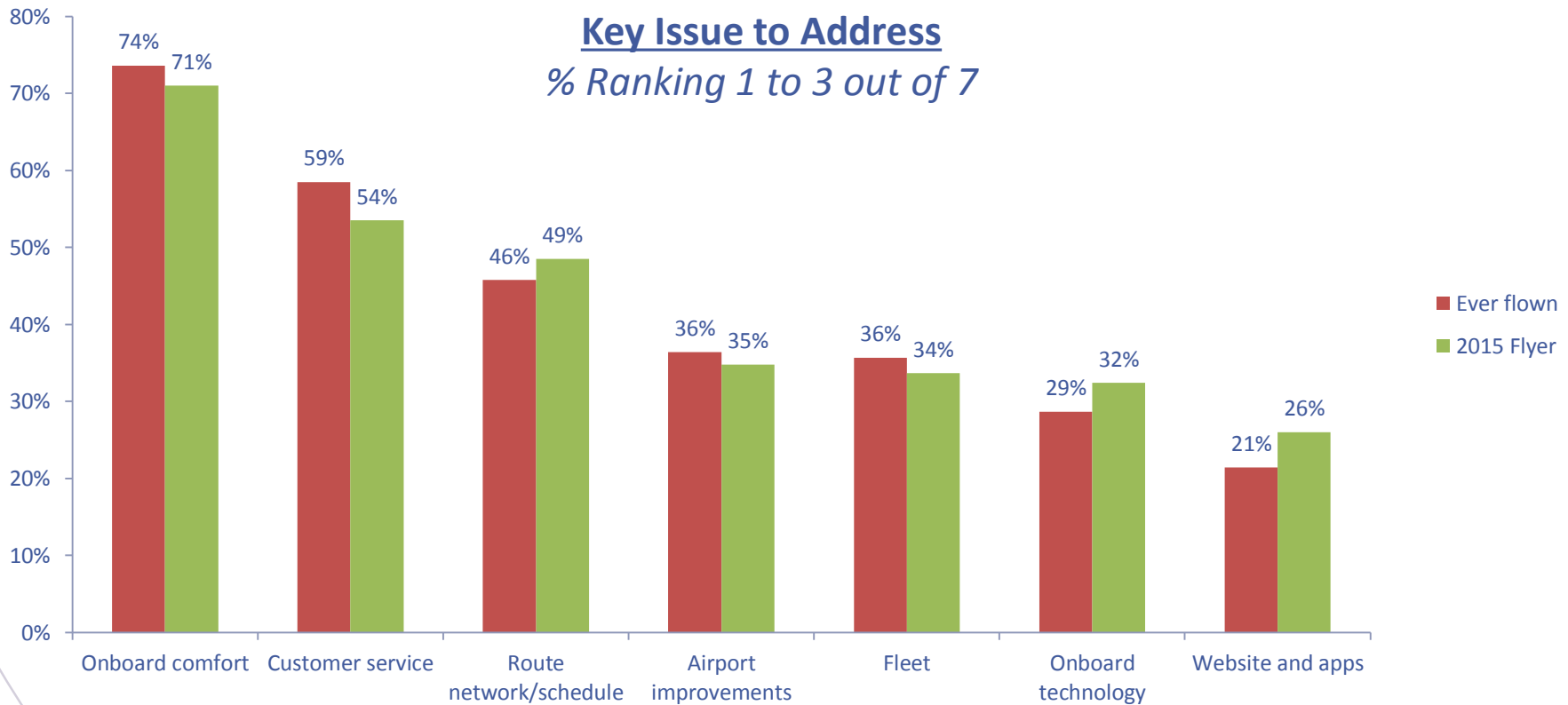
% Ranking 1 to 3 out of 6



Q24. In terms of your **inflight** experience, how would you RANK the following in importance?

Advice for CEO

- When asked to give advice to an airline CEO, all groups say that the highest priority should be improvements to onboard comfort; half put routes/schedules in top 3.
- Technology onboard the aircraft and the airline's website or mobile applications are considered the lowest priority items, though those who traveled in 2015 are more likely to say these items are important.

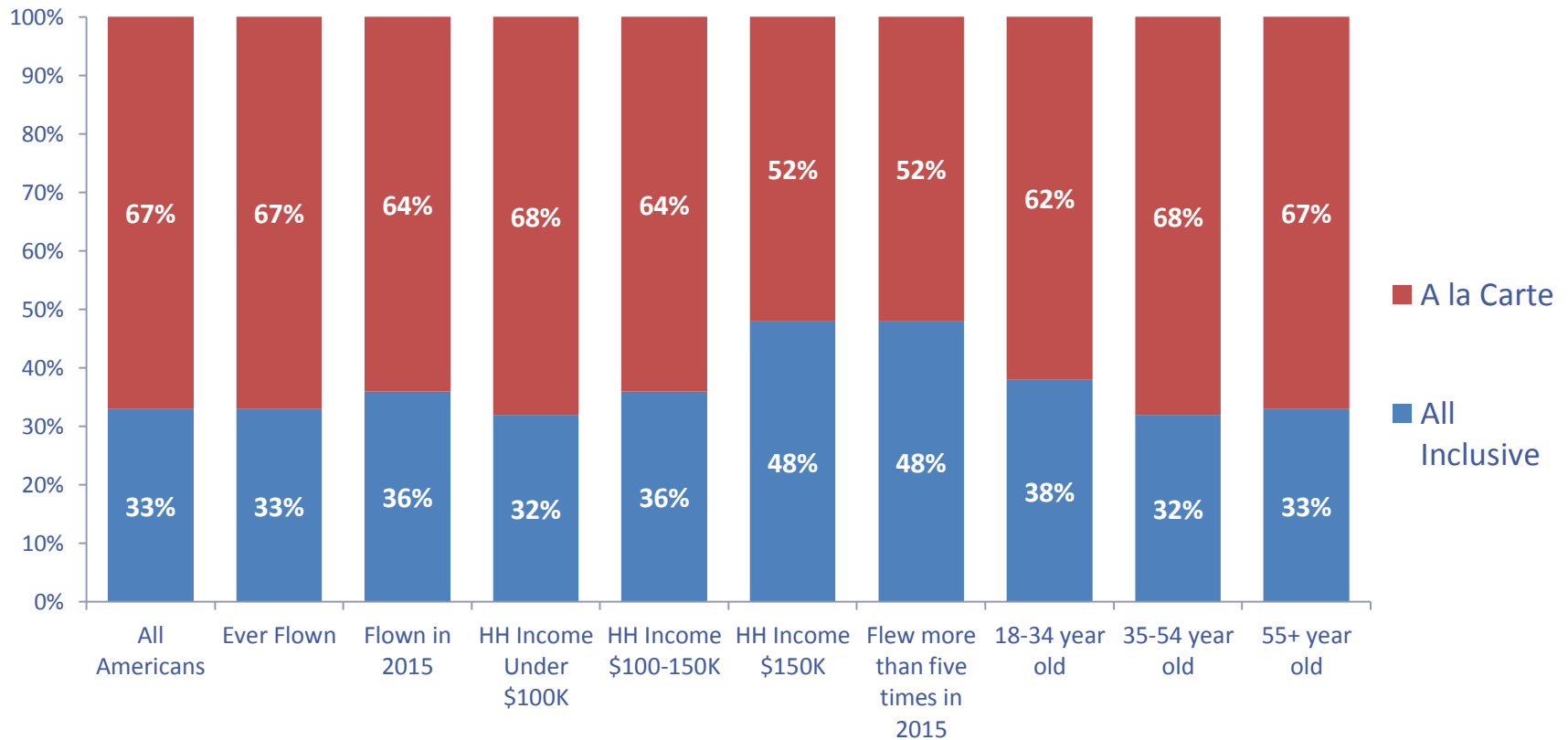


Q26. If you were able to advise the CEO of a major airline on how to prioritize future customer-oriented investments in the airline, how would you RANK the following?

Preference on tickets

- Two-thirds of Americans prefer the à la carte pricing model in which they pay only for those airline services/amenities that they need or want.
- This preference is highest among the least affluent households.

Ticket Type Preference



Q27. Which of the following statements do you agree with:

"I like paying one all-inclusive ticket price for a bundle/package of services (e.g., seat assignment, checked bag(s), meal), even if it's more expensive"

"I prefer to pay only (à la carte) for those airline services/amenities that I want/need, so my ticket ends up being less expensive"



Recap

Recap: Looking forward to 2016

- Americans are bullish about airline travel in 2016.
 - ⇒ 75% of 2015 airline travelers and 53% of all Americans say they are somewhat or very likely to travel by airline this year.
 - ⇒ Almost a third (29%) of all Americans say they will take more flights in 2016 along with the majority (55%) who expect to fly at the same rate.
- Price, convenience and reliability are the main reasons Americans choose to fly (rather than drive, take rail or other forms of transit).
 - ⇒ Generally, airport or inflight amenities, while appreciated, are not major reasons to select airline travel as the preferred travel method.
- And Americans are mostly looking for a hassle-free experience when they fly.
 - ⇒ 79% of Americans say ease and speed of getting through security is a top priority and 77% say the ease or efficiency of the boarding process is a top priority (1-3 out of 7).
 - ⇒ 91% say legroom is their top priority on the plane (1-3 out of 6), followed by 77% who want space for a carry-on.

Recap: Airline Travel Trends in 2015

- While the fraction of Americans who have ever flown has not changed dramatically in the last 18 years, the fraction of Americans currently flying has climbed and more Americans have access to air travel than ever before.
 - ⇒ In 2015, 81% of the American public reported experiencing airline travel in their lifetime. This is unchanged from 1997 (also 81%) but up significantly from 1971 (49%) the first year on record.
 - ⇒ The fraction of Americans reporting airline travel in the last year is 45%, up from 39% in 1997, 31% in 1986 and 21% in 1971.
 - ⇒ Younger travelers (35% of all airline travelers in 2015) and people with less than \$50,000 household income (35% of all airline travelers in 2015) are more likely to fly today than 18 years ago.
- However, the nature of airline travel has changed dramatically since 1997. In 1997, 47% of all trips were for business purposes. In 2015, that figure fell to 31%.
- The large majority – 80% – of airline travelers in 2015 report being satisfied with their overall airline travel experience in the past year.