

# Travel Inspire

Airline visit share by  
region and demographic

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Top 10 airlines: traffic and audience trends

hitwise



# Key Takeaways

Traffic to the airline industry as a whole has increased over the past 3 years. In this report we compare the top 10 airlines to determine key differences that may have impacted overall industry growth, and the success of some airlines over others.



## Southwest dominates, American rises in the ranks

1

Southwest Airlines has had the largest visit share of all airlines over the past 3 years, but is starting to lose steam. JetBlue is showing a significant loss in traffic, while American Airlines has shown a large increase.

2

## Geography is key to airline selection

Geography plays a role in the airline that people choose to travel with. Airlines with a wider reach, such as Southwest, perform better than airlines with limited options, like Virgin.

3

## Women rule the air

Looking at the composition of the airline website traffic, the audience tends to skew female. Women also visit these websites on average *more often* than their male counterparts. Most airlines have a similar age composition, but Virgin America attracts a younger crowd.

4

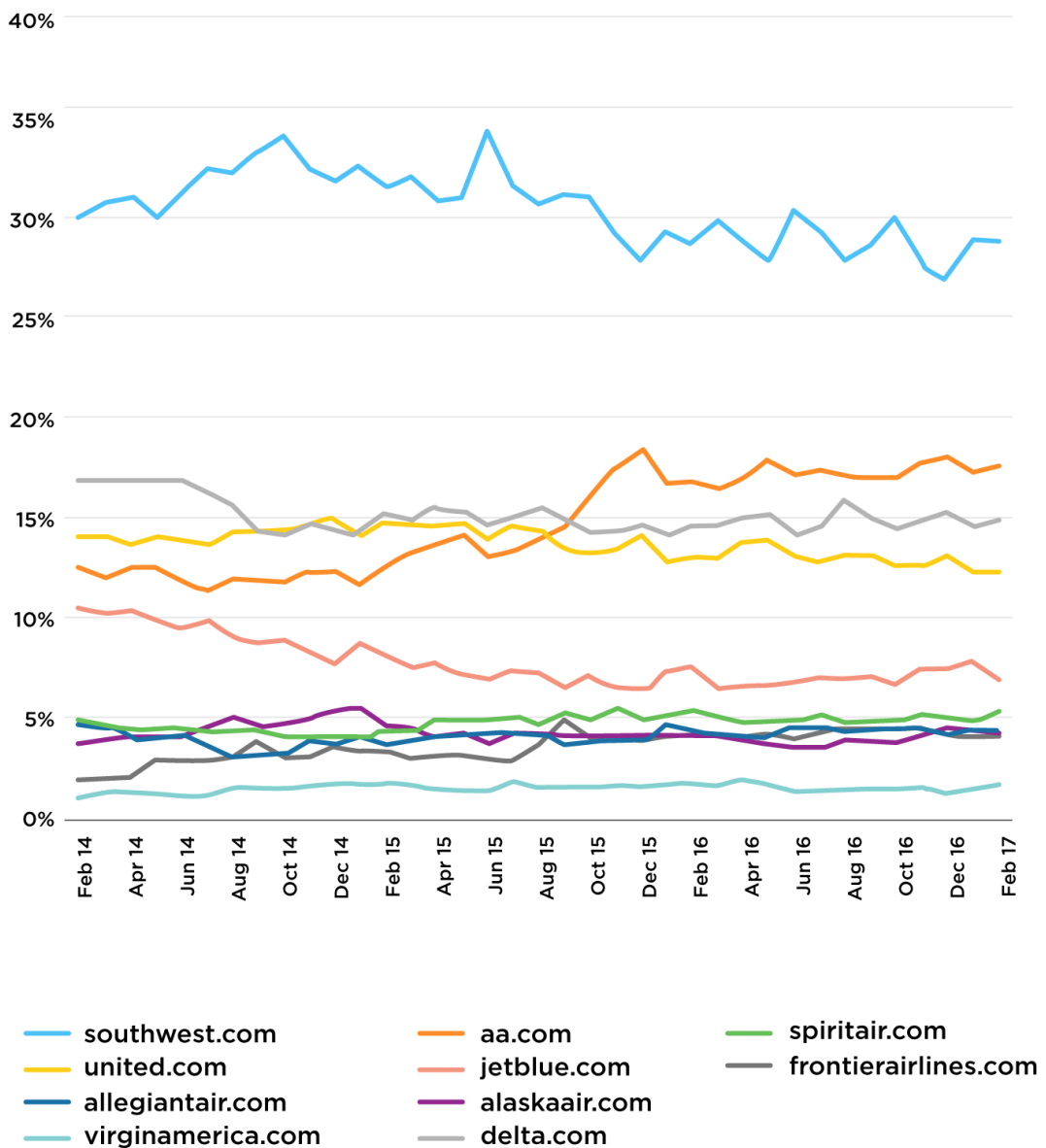
## Relationship status & income brackets

Most of the top 10 airline visitors are married, which has an impact on their income level breakouts. Household Income of \$50K-100K ranks top, and the second largest income breaks are split evenly between below \$50K and over \$150K.

# Top 10 Airlines: Online Market Share

The top 10 airlines have retained fairly consistent market share over the past 3 years, with Southwest Airlines getting the largest share of airline traffic. American Airlines has shown a significant increase in traffic share, while JetBlue has experienced a sizeable decline.

## Top 10 Airlines: Online Market Share



# Top Airline Geographic Penetration

Of the people visiting the top 10 airline sites, the following states have the highest percentage of visitors searching for air travel:

Colorado

Connecticut

California

Massachusetts

Nevada

California

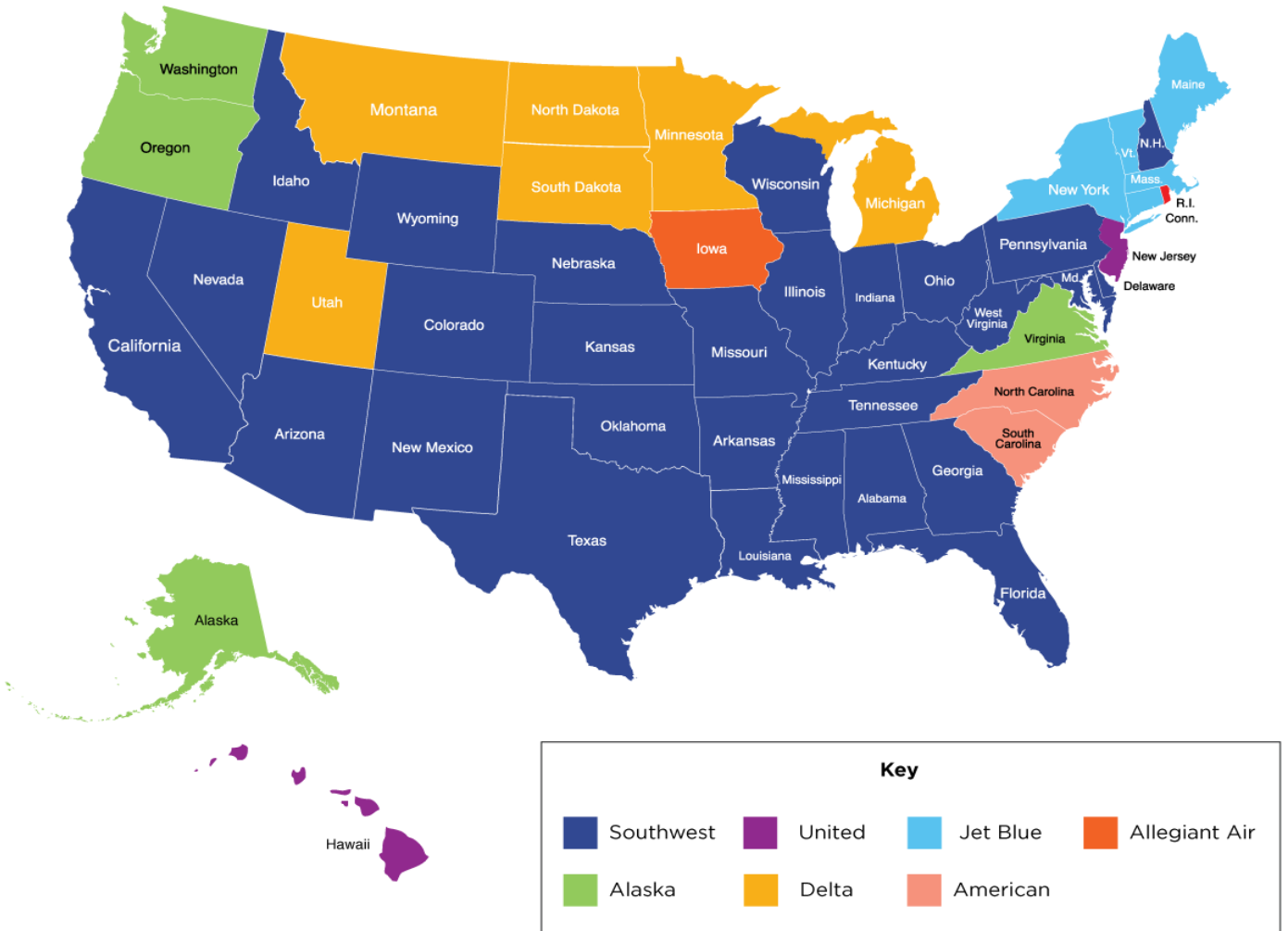
Florida

Arizona

Maryland

This map breaks down the top airlines by state, based on total share of visits:

## Top Airlines, by State



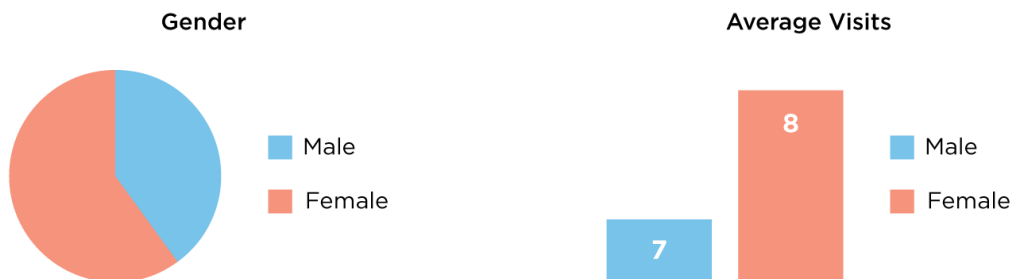
# Age and Gender Differences

The customer composition of the top 10 airlines tends to be fairly similar. However, Virgin America shakes things up by attracting a younger crowd; they also skew more heavily female compared to the airline industry as a whole. Women also visit airline websites more times than men do over the same time period.

## Composition of the Top 10 Online Consumers by Generational Age Breaks

|                           | Average Age | Millenials 18-34 | Generation X 35-49 | Boomers 50-69 | Silent Generation 70+ |
|---------------------------|-------------|------------------|--------------------|---------------|-----------------------|
| Southwest.com             | 44          | 30.5%            | 30.8%              | 32.8%         | 5.9%                  |
| AA.com                    | 45          | 30.1%            | 31.0%              | 33.1%         | 6.0%                  |
| Delta.com                 | 44          | 30.6%            | 30.8%              | 32.8%         | 5.8%                  |
| United.com                | 44          | 30.6%            | 31.4%              | 32.0%         | 5.9%                  |
| Jetblue.com               | 44          | 30.7%            | 31.2%              | 32.4%         | 5.7%                  |
| Spiritair.com             | 44          | 32.3%            | 29.7%              | 32.4%         | 5.5%                  |
| Allegiantair.com          | 45          | 28.2%            | 30.7%              | 35.3%         | 5.8%                  |
| Frontierairlines.com      | 44          | 31.3%            | 31.0%              | 32.6%         | 5.2%                  |
| <b>Virginairlines.com</b> | 42          | <b>34.3%</b>     | 32.2%              | 29.0%         | 4.5%                  |
| Alaskaair.com             | 44          | 31.5%            | 31.3%              | 31.7%         | 5.4%                  |

## Top 10 Airlines Online Visitors



# Income and Marital Status Differences

The top income bracket for all of the top 10 airlines is between \$50K-\$100K. Meanwhile, airlines somewhat evenly attract higher income vs. the lower income consumers. There seems to be a difference depending on available amenities, like First Class. Airline visitors skew towards being married, and married people visit airline sites more often than single people do over the same time period.

## Composition of the Top 10 Airlines Online Consumers by Household Income

|                      | Less than \$50K | \$50K-\$100K | \$100K-\$150K | More than \$150K |
|----------------------|-----------------|--------------|---------------|------------------|
| Southwest.com        | 25.36%          | 31.61%       | 19.55%        | 23.55%           |
| AA.com               | 24.25%          | 31.54%       | 19.13%        | 25.15%           |
| Delta.com            | 25.01%          | 31.37%       | 19.43%        | 24.19%           |
| United.com           | 24.00%          | 31.25%       | 18.97%        | 25.78%           |
| Jetblue.com          | 24.92%          | 31.35%       | 19.37%        | 24.36%           |
| Spiritair.com        | 25.66%          | 32.68%       | 18.48%        | 23.18%           |
| Allegiantair.com     | 26.49%          | 31.82%       | 19.31%        | 22.40%           |
| Frontierairlines.com | 25.02%          | 32.08%       | 18.96%        | 23.95%           |
| Virginairlines.com   | 23.94%          | 29.78%       | 18.75%        | 27.53%           |
| Alaskaair.com        | 24.27%          | 31.21%       | 19.40%        | 25.12%           |

## Top 10 Airlines Online Visitors



What's your visit share?

Want to know your market share within an industry, region or audience? Contact your client manager for help. Never heard of Hitwise? [Reach out here](#) to get this data for yourself.



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