



Q2 CONSUMER INSIGHTS: SEAMLESS AND SECURE TRAVEL

U.S. Travel's quarterly consumer survey with Ipsos—launched in early 2023—digs into the traveler experience and identifies barriers and points of friction that keep travelers at home or traveling within the United States less frequently. These insights help anticipate and identify consumer behaviors and risks—highlighting the greatest opportunities to grow travel.

KEY FINDINGS

The outlook for summer travel in the United States is strong.

- Over a quarter of Americans plan to increase the amount they are spending on leisure travel in the next three months (26%) up from 19% in Q1.
- Just over half of all Americans (53%) and 81% of leisure travelers have travel planned in the next six months.
- Six in 10 Americans (60%) agree that taking time off to travel is more important than ever—significantly higher than what Americans reported in Q1 (35%).

Yet, this summer will be a stress test for the U.S. air travel system.

- Two in five Americans (42%) say they have traveled by air for leisure in the past 12 months and 35% of those reported having a flight delayed or cancelled.
 - Less than one-third of recent air travelers (32%) are very satisfied with the air travel experience.
- On a positive note, travelers enrolled in expedited clearance programs such as TSA PreCheck are more satisfied (84%) with the overall air travel experience than those not enrolled (79%).
- Similar to Q1 2023, crowding and congestion (43%) along with flight delays or cancellations (40%) are the primary reasons for air travelers' less than satisfactory experience.
- Over half of Americans (52%) say they would travel more for leisure in the next six months if the travel experience was not as much of a hassle, significantly more than Q1 (29%).

The federal government has a prime opportunity this year to address system inefficiencies through the FAA reauthorization bill.

When asked what Congress should prioritize in the FAA reauthorization bill, a majority of recent air travelers (55%) want Congress to prioritize improvements to the air travel experience by addressing hassles such as reducing flight delays and cancellations (19%), offering more direct flights by addressing the pilot shortage (21%) or reducing congestion in airports (15%).

- Conversely, just 36% of recent air travelers want Congress to prioritize providing cash refunds or indefinite credits when flight delays or cancellations occur.
- And, if Congress made any of these legislative changes, 33% would travel MORE.



Americans are willing to share biometric data if it resulted in a more seamless, secure and efficient travel experience.

- Nearly two-thirds of recent air travelers (65%) are willing to share biometric information with TSA if it reduced the airport security process by 20 minutes.

The future growth of America's travel industry requires an air travel system that is modern, efficient, dependable and secure. Congress can make the necessary investments **now** to ensure our air travel system can meet demand for the future.

Source: Ipsos Poll conducted between March 30 – April 7, 2023, by Ipsos using the probability-based KnowledgePanel®. This poll is based on a nationally representative probability sample of 1,372 general population adults aged 18 or older. The sample includes 663 respondents who have traveled by air in the past 12 months, 971 past or future leisure travelers, and 316 past or future business travelers.