



NEW SURVEY ILLUMINATES TRAVELER FRUSTRATIONS

Federal government must prioritize improvements across air travel ecosystem to achieve greater growth

U.S. Travel's quarterly consumer survey with Ipsos—launched in early 2023—uncovers insights into the traveler experience and identifies barriers and points of friction that influences travel decisions. These insights help anticipate and identify consumer behaviors and risks—highlighting the greatest **opportunities to grow travel**.

The following highlights offer perspectives from all Americans and recent air travelers, a subset of the survey population that indicated having taken an air travel trip in the last three months.

As travel demand begins to normalize, travelers are noting pain points and obstacles, some even before arriving at an airport, which are having a meaningful impact on demand.

Specifically, **air travel hassles are hindering travel industry's growth** as inefficiencies are negatively impacting travel plans, costing the U.S. economy billions of dollars.

- Nearly six in 10 recent air travelers say the air travel experience is **the same or worse than going to the DMV**.
- And if hassles were reduced, half of air travelers agree they would **travel more in the next six months**.
- **Fewer than one in five recent air travelers** (17%) rate their overall experience as excellent and entirely hassle free.
- Additionally, one-quarter of recent air travelers (24%) are less likely to book air travel over the next year due to air travel hassles experienced.
 - The top reasons they'll avoid traveling are the likelihood of flight delays or cancellations and airport process inefficiencies.
- Air travelers are **avoiding an average of 2 trips per year** due to air travel hassles, equating to **27 million trips avoided** and **\$71 BILLION IN LOSSES** for the U.S. economy over the next year.
- Yet, travelers enrolled in TSA PreCheck/Global Entry are significantly more satisfied with nearly all aspects of the travel experience.

Air travel inefficiencies are holding back business travel's return which remains 29% below 2019 levels at the end of 2022.

- Although 74% of business travelers plan to travel for work in the next six months, **one third report traveling LESS than they did pre-pandemic**.
 - The unpredictability of flights due to cancellations and delays is one reason for a reduction in

business travel.

- Nearly four in 10 organizations (38%) have policies in place restricting business travel.
 - The top policy in place is additional cost controls or spending limits for business trips.
- Business travelers would take an average of **TWO more business trips per year** if air travel hassles improved, resulting in **18 million additional trips and \$52 BILLION in ECONOMIC IMPACT**.

Solutions exist and the majority of Americans and even higher percentage of air travelers are **willing to share biometric data** if it resulted in a more seamless, secure and efficient travel experience.

- Nearly **six in 10 recent air travelers (59%)** say as a result of advances in security technology, it is **time for the government to update certain security measures**.
- Roughly **two thirds of recent air travelers and business travelers** are comfortable sharing their biometric data with either the government, a private corporation or both.
- More than half of Americans are comfortable using biometrics to board a plane (52%), get through security (55%), touchless ticketing (51%) or to check in for a flight (51%).
 - Recent air travelers are even more comfortable using biometrics to board a plane (63%), get through security (68%), touchless ticketing (64%) or to check in for a flight (62%).

As seasonality trends return this fall, demand for travel remains strong but is normalizing somewhat following more than two years of unprecedented pent-up demand—inefficiencies threaten to stall this demand if not addressed.

- Just **under half (49%) of Americans** plan to travel in the next six months, down from Q2 (53%) and Q1 (52%).
 - Nearly three-quarters of leisure travelers (74%) have plans to travel for leisure in the next six months, down from 81% in Q2 and 79% in Q1.
- One in five Americans plan to **increase the amount they spend on leisure travel** in the next three months, about on par with Q1 levels (19%) but below Q2 (26%).
- More than half of Americans (54%) and 66% of leisure travelers agree that ‘taking time off to travel is more important than ever’.

Source: Ipsos, Longwoods International, J.D. Power

Ipsos Poll conducted between August 11 – 20, 2023, by Ipsos using the probability-based KnowledgePanel®. This poll is based on a nationally representative probability sample of 1,408 general population adults aged 18 or older. The sample includes 469 respondents who have traveled by air in the past 3 months, and 363 business travelers. Margin of error: +/- 2.8 percentage points at the 95% confidence level for all respondents.