



## TOPLINE & METHODOLOGY

### U.S. Travel Association Consumer Quarterly Tracker – Q3 2023

#### Topline Findings

##### Highlights of Key Findings

- In general, Americans are traveling and their interest in traveling remains high, but will ramp down a few percentage points as the back to school and back to work period impacts American's ability to travel.
- One quarter of all air travelers and air travelers in the past three months rate their most recent air travel experience as fair or poor, meaning they experienced several to numerous hassles or inconveniences. Half of all air travelers agree they would travel more in the next six months if the travel experience were not as much of a hassle.
- Only a third of all air travelers find the air travel process to be better than going to the DMV in terms of the requirements and hassles involved. The majority of air travelers find air travel to be worse or the same as going to the DMV.
- Air travelers enrolled in TSA PreCheck/Global Entry are significantly more satisfied with most aspects of the travel experience than those without PreCheck, highlighting the importance of this feature.
- While Americans are generally supportive of allowing biometric use for a more seamless and smooth air travel process, about half of all Americans are uncomfortable sharing their biometric data with both the government and private corporations.
- One third of business travelers report traveling less for business post-pandemic than they did pre-pandemic. These business travelers say the primary reason they are traveling less than before is a lack of client or industry demand for in-person events. However, the unpredictability of flights due to cancelations and delays is also a contributor to avoiding business travel.





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### Detailed Topline Findings

#### *Overall Travel and Spending Behaviors*

- Just under half of all Americans (49%) plan to travel in the next 6 months, significantly less than the amount that planned to travel in the next six months in Q2 (53%) and Q1 (52%). This shouldn't be a surprise as Americans are transitioning from Summer Vacation Travel to “back to work” and “back to school”.
  - Those who rated their most recent air travel experience as excellent or good are more likely to have upcoming travel plans in the next six months (59%), compared to the national average.
  - On average, Americans with travel planned for the next 6 months plan to take about 2 trips.
- Among Americans with upcoming travel plans, their primary reasons for travel are a vacation (62%), followed by spending time with family or friends for non-holiday related reasons (48%). About one quarter plan to travel for the winter holidays this year (23%), and 16% for the Thanksgiving holiday.
  - Nearly three quarters of Americans (72%) and air travelers (74%) say they plan to avoid travel during high demand periods such as Labor Day or Christmas.
  - Younger generations are more likely to be traveling for the upcoming winter holidays than Baby Boomers (33% of Gen Z, 28% of Millennials, 25% of Gen X, 15% of Baby Boomers). Gen Z is the most likely to be traveling for thanksgiving (27%), compared to Millennials (17%), Gen X (15%), and Baby Boomers (14%).
  - Millennials are most likely to be traveling for a vacation (69%) relative to Gen Z (52%) and Baby Boomers (58%). Millennials are also significantly more likely to be traveling for an event such as a wedding or birthday (31%), compared to Gen X (18%) and Baby Boomers (17%).
  - There are no significant differences in types of upcoming travel by race, gender, or region.

#### *Air Travel Experience*

- When it comes to the overall travel experience, about one quarter of both all air travelers (24%) and air travelers from the past three months (23%) rate their overall air travel experience as fair or poor, meaning they experienced several to numerous hassles or inconveniences. Less than one in five of all air travelers (16%) or air travelers in the past three months (17%) rate their overall experience as excellent and entirely hassle free.
  - Travelers who have recently had a flight delayed or cancelled are significantly more likely to rate their overall experience as fair or poor (33%) compared to those who have not experienced any delays or cancellations (16%).



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- Air travelers enrolled in TSA PreCheck/Global entry are significantly more likely to rate their overall experience as good or excellent (81%), compared to those not enrolled (71%).
- Only a third (37%) of all air travelers find the air travel process to be better than going to the DMV in terms of the requirements and hassles involved. The majority of air travelers (60%) find air travel to be worse or the same as going to the DMV.
  - Travelers enrolled in TSA PreCheck/Global entry are significantly more likely to say the air travel process is better than going to the DMV (52%) compared to those who are not enrolled (34%).
- Those who rated their most recent air travel experience as fair or poor are least satisfied with the length of time getting through security screening (46%), their flight departing and arriving on time (43%), the process of retrieving their checked baggage upon arrival (42%) and availability of parking at the airport (32%).
- Air travelers enrolled in TSA PreCheck/Global Entry are significantly more satisfied with most aspects of the travel experience than those without PreCheck, including the amount of time it takes to get through security (89% with vs. 65% without) and their experience with TSA employees (90% with PreCheck vs. 72% without).
- Half of all air travelers agree they would travel more in the next six months if the travel experience were not as much of a hassle. Additionally, 16% of air travelers agree that due to a recent negative experience, they will plan to travel less in the future.
  - About one quarter of all air travelers (29%) are less likely to book air travel over the next year due to the hassles involved with the overall air travel experience, primarily citing the likelihood of flight delays and cancellations making the trip too unpredictable (32%) and airport hassles (28%) as their main hassles.
  - On average, travelers who are likely to avoid air travel due the hassles involved anticipate taking about 2 trips fewer over the next year.
  - Air travelers not enrolled in TSA PreCheck/Global entry are significantly less likely to book air travel over the next year (31%) compared to those enrolled (21%).

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- When asked what policies Congress should prioritize to improve the air travel experience and motivate air travelers to take more trips, half of all Americans prefer Congress to prioritize reducing the number of flights delayed or canceled. A larger share of all air travelers (53%) and air travelers from the past three months (58%) also prefer Congress prioritize this policy over ensuring cash refunds for canceled or extremely delayed flights.
  - The majority of recent voters also prefer prioritizing reducing the number of flight delays and cancellations (54%) over cash refunds for extremely delayed flights (44%).
  - Among Americans who prefer this policy, one in five (20%) indicate they would travel more if Congress were to reduce the number of delayed or canceled flights. The one in five travelers who say they would travel more if this policy was enacted say they would take about 2 more trips per year, on average, if this change was enacted.

### ***Security Technology and Biometrics***

- About half of all air travelers (49%) say that as a result of advances in security technology, it is time for the government to reassess certain security measures such as restricting the size of liquids allowed in carry on luggage or the requirements to remove shoes and belts when at the TSA security check point.
  - Travelers who have traveled by air in the past three months are more likely to agree that the government should relax these security requirements due to advances in technology (59%).
- While the majority of Americans are comfortable with allowing biometric use if it results in a more seamless and smooth air travel process, half of all Americans (51%) say they are not comfortable sharing biometric data with the government or private corporations.
  - Recent air travelers show more comfort sharing biometric data, with 62% saying they are comfortable sharing their data with the government or a private corporation or both.
  - Among Americans who say they are comfortable with sharing biometric data in all potential use cases, these majority are also comfortable sharing that data with either the government, private corporations, or both (80%). The largest share are equally comfortable sharing biometric data with both (47%).
  - Similar to Q1, about half of all Americans say they are comfortable using biometrics to board a plane at the gate (52%), to get through security (55%), as touchless ticketing (51%) and to check in for a flight (51%).
    - A higher percentage of those who have traveled by air in the past three months are comfortable using biometrics for all aspects of the air travel process).

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### *Business Travel*

- When asked what is the main hassle that would cause them to avoid traveling for work, business travelers primarily report the likelihood of flight cancelations and delays making the trip too unpredictable, echoing the same complaint of those traveling for leisure.
  - If their primary hassle of flight cancelations and delays were improved, business travelers report that on average they would take 2 more trips for business per year.
  - Business travelers also report that restrictive company travel policies and clients preferring video calls to in-person meetings are other important contributors to avoiding business travel.
- On average per year, business travelers are traveling for business a few times each year (32%) to once a quarter (15%). Over the past 12 months, these business trips primarily include attending a conference, convention, or trade show (68%), while about two in five report visiting clients or other stakeholders (42%) or attending internal offsite meetings with remote colleagues (40%).
- In the next six months, business travelers anticipate traveling once a quarter, on average. However business travel intentions vary by type of traveler and remote work.
  - Hybrid and remote workers anticipate traveling more for business than those working from their workplace only, anticipating traveling a few times this year compared to just once a year among non-remote workers. \*NOTE: Those working in their workplaces only are more likely to be in the construction, manufacturing, retail, and healthcare industries which may impact business travel expectation.
  - Transient business travelers who travel to visit customers or other stakeholders anticipate significantly more business travel than group business travelers (e.g. traveling for conferences or event) or internal business travelers (e.g. traveling for internal meetings). On average, transient business travelers anticipate traveling once a quarter over the next six months.
  - One third (33%) of business travelers report traveling less for business post-pandemic than they did pre-pandemic. These business travelers say the primary reason they are traveling less than before is a lack of client or industry demand for in-person events (39%), followed by company and upper management travel policies (23%).



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### About the Study

This Ipsos Poll was conducted on behalf of the U.S. Travel Association August 11 – 20, 2023, by Ipsos using the probability-based KnowledgePanel® – a division of Ipsos. This poll is based on a nationally representative probability sample of 1,408 general population adults age 18 or older. The sample includes 469 respondents who have traveled by air in the past 3 months, and 363 past or future business travelers.

The survey was conducted using the web-enabled KnowledgePanel®, which is the largest and most well-established online panel that is representative of the adult US population. Our recruitment process employs a scientifically developed addressed-based sampling methodology using the latest Delivery Sequence File of the USPS – a database with full coverage of all delivery points in the US. Households are randomly selected from all available households in the U.S. Persons in these households are invited to join and participate in the web-enabled KnowledgePanel®. For those potential panel members who do not already have internet access, Ipsos provides a tablet and internet connection at no cost to the panel member. Those who join the panel and who are selected to participate in a survey are sent a unique password-protected log-in used to complete surveys online. As a result of our recruitment and sampling methods, samples from KnowledgePanel cover all households regardless of their phone or internet status and provide fully representative online samples to the research community.

The study was conducted in English only. The data were weighted to adjust by age, race, education, household income, Census region, metro status, business traveler, and leisure traveler. The demographic benchmarks came from the 2022 March supplement of the U.S. Census Bureau's Current Population Survey (CPS). The business and leisure travel benchmarks came from the weighted main sample only. The weighting categories were as follows:

- Age (18-34, 35-49, 50-64, 65+) by Gender (Male, Female)
- Race (White/Non-Hispanic, Black/Non-Hispanic, Other/Non-Hispanic, Hispanic, 2+ Races/Non-Hispanic)
- Education (Less than HS, HS graduate, Some College, Bachelor or higher)
- Household Income (Under \$25,000, \$25,000-\$49,999, \$50,000-\$74,999, \$75,000-\$99,999, \$100,000-\$149,999, \$150,000 and over)
- Region (Northeast, Midwest, South, West )
- Metro status (Metro, non-Metro)
- Business traveler (Yes, No)
- Leisure traveler (Yes, No)

The margin of sampling error is plus or minus 2.80 percentage points at the 95% confidence level, for results based on the entire sample of adults. The margin of sampling error takes into account the design effect, which was 1.13. The margin of sampling error is higher and varies for results based on sub-samples. In our reporting of the findings, percentage points are rounded off to the nearest whole number. As a result, percentages in a given table column may All Americans slightly higher or lower than 100%. In questions that permit multiple responses, columns may All Americans substantially more than 100%, depending on the number of different responses offered by each respondent.





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### About Ipsos

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and Mid-60 indices and is eligible for the Deferred Settlement Service (SRD). ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP [www.ipsos.com](http://www.ipsos.com)

