

The vast majority of Americans do not have or are confused about REAL ID driver's licenses¹

- ★ **87%** of American adults say they have a state-issued driver's license, making it the most commonly held and important form of identification for commercial air travel
 - **53%** say they have a U.S. passport or passport card (second highest response)
 - Only **9%** say they have a DHS trusted traveler card
- ★ Only **16%** of Americans believe they have a REAL ID license and can correctly identify the star
 - **44%** of Americans believe their state-issued driver's license is a REAL ID
 - **16%** said they were certain because a star appeared in the upper righthand corner of their license (which is the best indicator of a REAL ID)
 - **14%** said they were informed by the DMV, but did not also select the star
 - The remaining respondents cited reasons which indicate they are either incorrect or may be confused, including:
 - **5%** who said they were certain because a microchip appeared on their license
 - **3%** who said they were certain because an American Flag appeared on their license
- ★ In total, an estimated **182 million Americans² (72%)** say their driver's license is not a REAL ID or they may be confused
 - **21%** say they are certain their license is not a REAL ID
 - **23%** say they are unsure if their license is a REAL ID
 - **28%** believe their license is a REAL ID but did not correctly identify the star

Nearly 2-in-5 Americans say they do not have any form of REAL ID compliant documents³

- ★ An estimated **99 million Americans⁴ (39%)** say they do not have any form of identification that will be accepted starting October 1, 2020
- ★ **61%** of Americans say they have at least one form of REAL ID-compliant documents
 - **16%** say they have a state-issued REAL ID (and correctly identified the star)
 - **39%** say they have a passport, but do not have a state-issued REAL ID or are unsure whether their driver's license is a REAL ID
 - **6%** that have some other form of REAL ID-compliant identification, but no state-issued REAL ID or passport
- ★ Of the **60%** of Americans who say they are planning to fly in the next two years
 - Only **18%** are certain they have a state-issued REAL ID and correctly identified the star
 - **62%** have a passport or some other federally approved identification, but either do not have a REAL ID or are uncertain if their driver's license is REAL ID compliant
- ★ Only **42%** of passport holders say they typically carry their passports with them when traveling domestically by air⁵

REAL ID SURVEY

SUMMARY OF FINDINGS

Most Americans are unaware of the October 1, 2020 deadline for air travel⁶

- ★ Only **43%** of Americans are aware that as of October 1, 2020 they will be required to present a REAL ID-compliant document at TSA checkpoints
- ★ **57%** of Americans are unaware of the October 1, 2020 REAL ID deadline for air travel, including:
 - **30%** who said they don't know or are unsure about a REAL ID deadline
 - **9%** who believe a REAL ID will be required for purchasing a firearm
 - **5%** who believe a REAL ID will be required for registering a vehicle with the DMV

Most Americans support government action to mitigate challenges posed by REAL ID Implementations⁷

- ★ When asked what steps, if any, should be taken to address challenges posed by REAL ID implementation, **70%** of Americans said they support some kind of leniency for travelers without REAL ID driver's licenses or acceptable alternatives
- ★ Only **29%** believe the deadline should be enforced without any exceptions
- ★ Alternatives include:
 - Providing an additional short-term grace period
 - Allowing those without a REAL ID to pass through, but with additional personal and baggage screening
 - Allow short-term exemptions for travelers who begin enrollment in Precheck

If Americans fail to obtain proper identification ahead of October 1, 2020, the disruption to air travel could have a significant impact on the U.S. economy⁸

- ★ If REAL ID enforcement were implemented today, an estimated **78,500 travelers** could be turned away on the first day, resulting in **\$40.3 million** (excluding airfares) **in lost travel spending** on the first day.
- ★ If this daily impact lasted a week, an estimated **549,500 air travelers** could be turned away in the first week, costing travel businesses nearly **\$282 million in lost spending**.

REAL ID SURVEY

SUMMARY OF FINDINGS

METHODOLOGY

To help quantify the challenges posed by REAL ID implementation, the U.S. Travel Association commissioned Longwoods International, a market research consultancy, to conduct two surveys measuring public's understanding of REAL ID identifications and the October 1, 2020 enforcement deadline for commercial air travel.

The July 2019 survey was an online self-completion survey fielded July 9 through 12, 2019 using a national sample randomly drawn from Dynata's consumer panel of 1,000 adults, ages 18 and over. The results were weighted at tabulation to correct for differences between the observed sample and the sample universe using the most recent Census targets for age, gender, income, household composition and region. The survey has a margin of error +/-3% at 95% confidence level.

The September 2019 survey was an online self-completion survey fielded September 4 through 6, 2019 using a national sample randomly drawn from Dynata's consumer panel of 1,000 adults, ages 18 and over. The results were weighted at tabulation to correct for differences between the observed sample and the sample universe using the most recent Census targets for age, gender, income, household composition and region. The survey has a margin of error +/-3% at 95% confidence level.

1. July 2019 Longwoods International Survey
2. Analysis by U.S. Travel Association
3. July 2019 Longwoods International Survey
4. Analysis by U.S. Travel Association
5. September 2019 Longwoods International Survey
6. September 2019 Longwoods International Survey
7. September 2019 Longwoods International Survey
8. Analysis by U.S. Travel Association