

Effects of Price Reduction and Application Streamlining on Potential TSA PreCheck Enrollment

The U.S. Travel Association has conducted a study to estimate the number of air travelers who would be more likely to enroll in the TSA PreCheck program if:

- 1) the price of enrolling in the program were reduced; or
- 2) the application process were simplified.

To identify these answers, U.S. Travel partnered with the market research firm TNS to survey a representative sample of domestic air travelers in the U.S. who have flown at least once in the last year to determine their likelihood of enrolling in TSA PreCheck.

Currently, travelers must pay a one-time non-refundable \$85 application fee and complete a two-step online and in-person application process. Once approved, membership in TSA PreCheck is valid for five years. To calculate the total number of potential TSA PreCheck enrollees motivated by price reduction or application streamlining, these survey results were then incorporated into U.S. Travel's estimates of how many domestic air travelers there are in the U.S. overall, as well as TSA PreCheck enrollment numbers provided by TSA.

Key Findings

- Of all respondents who are not currently enrolled in TSA PreCheck, 20.5 percent indicated that they were likely to enroll.
- Of respondents not currently enrolled in TSA PreCheck who stated that they were unlikely to enroll the program:
 - Half think the cost to enroll in the program is too high; and
 - One in five thinks the application process is too complicated.
- Of respondents who stated that the cost to enroll in TSA PreCheck is too high:
 - 21 percent would be more likely to enroll if the price were reduced by up to \$25, to \$60.
- Of those who stated that the application process is too complicated:

- 55 percent would be more likely to enroll in the program if TSA simplified the application by moving it entirely online, and implemented other streamlining measures such as enabling travelers to enroll via mobile device.
- Overall, reducing the cost of enrollment and streamlining the application process would motivate 18 percent of respondents to enroll in TSA PreCheck.

According to analysis of this survey data, when applied to the total estimated population of domestic air travelers in the U.S., **lowering the enrollment fee and simplifying the application process would motivate seven million previously hesitant travelers** to enroll in TSA PreCheck, in addition to those who currently intend to sign up and the 2.5 million currently enrolled members.

The Department of Homeland Security's goal of enrolling approximately 25 million air travelers in all of its trusted traveler programs (TSA PreCheck and U.S. Customs and Border Protection's Global Entry) is therefore plausible with some modifications to TSA PreCheck.

Methodology

- The U.S. Travel Association used the TNS TravelsAmerica survey program, a syndicated online tracking study that provides leisure and business travel information to clients. The survey targets were drawn from domestic air travelers (defined as travelers who have flown at least once in the past 12 months) within the TravelsAmerica program database. TNS completed 1,000 interviews from this representative sample March 7-10, 2016.
- Survey respondents consisted of general population males and females over the age of 18, representative of gender, geographic division, income, household size, household designation and market size. The survey has a margin of error of +/- 4 percent at 95 percent confidence level.
- Because the TNS survey of 1,000 respondents is a representative sample of U.S. domestic air travelers, the results of this study can be used to extrapolate the findings to the total population of domestic air travelers in the U.S., based on standard statistical estimation methods.
- The U.S. Travel Association generates the estimate for the current total number of domestic U.S. air travelers. This number is widely used in research as a benchmark of air travel.

About the U.S. Travel Association and TNS

The U.S. Travel Association is the national, non-profit organization representing all components of the travel industry that generates \$2.1 trillion in economic output and supports 15 million American jobs. U.S. Travel's mission is to increase travel to and within the U.S. The association seeks to increase the understanding of tourism's immense importance to the economy, social and cultural life of the United States through an array of marketing and economic research programs providing information for all components of the industry, both large and small.

U.S. Travel is a leader in domestic and international travel research, providing the aggregate statistical dimension that gives the industry meaning and relevance among policy makers in government, business, education and the news media.

For decades, the U.S. Travel research team has prepared various full-scale studies, including traveler profile and travel economic impact reports for state, regional and local tourism development/marketing entities nationwide. The U.S. Travel Association is the only organization currently producing national and state-level estimates that can be compared across all 50 states, and are considered the national standards for benchmarking. This status is also reflected in the fact that U.S. Travel's economic impact estimates are featured annually in the Statistical Abstract of the United States.

TNS is a leading full-service custom market research agency in North America, delivering precise insights and actionable growth strategies that provide a vital competitive edge for their clients. TNS is under the umbrella of TNS Global, one of the largest research agencies worldwide, with a presence in over 80 countries.