TOPLINE AND METHODOLOGY

U.S. Travel Association Consumer Quarterly Tracker – Q1 2023
Topline Findings

Washington DC, February 1, 2023

Topline Findings

1. **Americans' upcoming travel plans and where travel falls in budget priorities**

   - Just over half of all Americans (52%) are planning to travel for leisure purposes in the next 6 months. A similar share of Americans (59%) report traveling for leisure purposes in 2022.
     - 3 in 5 Gen Xers plan to travel for leisure in the next six months (61%), significantly more than Gen Zers or Millennials.
     - Voters are also significantly more likely to have upcoming leisure travel plans compared to those who did not vote in the past three elections (62% vs. 36%, respectively).
   - About 1 in 4 Americans (23%) plan to travel more for leisure in 2023 than they did in 2022, while a small majority (51%) are planning to travel the same amount.
     - Relatedly, about 2 in 5 Americans (39%) say their spending on leisure travel will not change in the next three months, while 19% say their spending will increase.
     - Voters are significantly more likely to report they will be increasing their spending on leisure travel in the next three months (22%), than are non-voters (15%), though the majority of both groups do not intend to increase spending on travel.
   - A plurality of Americans are concerned about their finances, with 49% rating their current financial status as average or below. When asked where leisure travel falls in their saving priorities for 2023, under one quarter (22%) say leisure travel will be a top priority in their personal budget for 2023.
     - Voters are slightly more likely than non-voters to report travel will be a main priority in their budgets for the upcoming year (25% vs 16%, respectively).
   - Despite being low on the priority list for saving, Americans do show interest in leisure travel. Over one quarter of Americans (29%) say they like to travel and plan leisure trips when possible, though it is not a high priority in the budget. Additionally, if given a lump sum of $2,500, similar to the value of the average tax return, leisure travel does fall within the top three areas Americans would spend this money, coming in as a third priority behind home improvements and savings.

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2. Leisure travel experiences and what would encourage Americans to travel more

- About 1 in 10 Americans who have traveled by air rate the overall travel experience of their most recent leisure trips by air as excellent (13%). Two in five rate their experience as good (41%), while the largest share (45%) rate it as average or below.

- The specific factors rated the lowest from their most recent travel experience include length of time getting through security (58% rating as average or below), in-flight comfort (68% rating as average or below), the experience within the airport once through security (50% rating as average or below), and the process of checking a bag (50% rating as average or below)

    - Americans who are currently enrolled in an expedited airport clearance program such as TSA PreCheck or CLEAR are significantly more likely to rate their experience with the length of time getting through security better than those not enrolled in the program. 54% of those enrolled rate their experience as good or excellent, compared to 35% of those not enrolled.

    - The same is true for experiences within the airport once through security and the process of checking a bag – significantly more Americans enrolled in PreCheck or CLEAR rate their experiences with these processes as good or excellent (57% for experience in airport, 62% for process of checking a bag), compared to those not enrolled (47% for experience in airport, 45% for process of checking a bag).

- Americans who have traveled by air with a less than excellent experiences primarily cited crowding and congestion (58%), flight delays or cancellations (44%), the airport security process (31%), and cumbersome travel logistics (31%) as the top three contributing factors to their less than excellent travel experience. When asked to elaborate

- Personal financial reasons are the primary reason Americans say they have not travelled more by air in the past 6 months (38%), followed by health concerns about COVID, flu, or RSV (24%), the possibility of flight cancellations or delays (17%), and preferring to drive to their destination (17%). Those who do not have upcoming leisure travel planned also list personal financial reasons as the main contributor (45%), followed by disinterest or lack of reason to travel (40%)

    - Baby boomers are significantly more likely to cite health concerns as a deterrent to travel in the past six months than are millennials (29% and 18%, respectively).

    - Additionally, non-voters are significantly more likely to cite personal financial reasons (48%) than are voters (33%).

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- The top three factors all Americans say would encourage them to travel more by air in the next six months are increased flight availabilities and direct flight options (31%) and travel discounts or loyalty programs (29%).
    - For their upcoming leisure travel, business travelers are most interested in increasing flight availability and direct flights (43%), and travel discounts and loyalty programs (33%). They are also significantly more likely to want flexible cancellation policies (32%).
- Few Americans are benefitting from the speed and convenience of expedited airport clearance programs like TSA PreCheck/Global Entry or CLEAR. Just 17% are currently enrolled in TSA PreCheck and even fewer are enrolled in CLEAR (3%). One third of Americans (33%) say they are not aware of TSA PreCheck and almost double that number say they are not aware of CLEAR (65%).
    - More than one third (35%) of Business Travelers are enrolled TSA PreCheck and nine percent (9%) are enrolled in CLEAR.
- About half of all Americans say they would be comfortable sharing biometric data such as fingerprints, facial recognition, etc. with TSA for a more seamless, secure, and efficient travel experience. Specifically, Americans say they are comfortable with biometrics to board a plane (52%), get through airport security (52%), check in for a flight (51%), for touchless ticketing technology (50%), or to check their bags (47%).
    - Voters are significantly more likely to support biometric data being used to improve travel security and efficiency on all measures, compared to those who did not vote in the past three elections.
    - Business Travelers are the most supportive of biometric data uses for travel security and efficiency

3. Business Travel Decision Making

- Less than one quarter of employed Americans have an upcoming business trip planned in the next 6 months (22%). The majority of employed Americans do not travel for business (61%). About one third travel once a quarter to once a year (31%), while fewer than 1 in 10 employed Americans report traveling for business once a month or more (8%).
- Americans show some level of interest in "bleisure travel" with 11% saying they are prioritizing trips that mix business travel with leisure travel in 2023.
    - Most Americans with business travel planned in the next six months also have leisure travel planned in the same time frame (81%).
    - Millennials show the most amount of interest in "bleisure travel" (18%), significantly more than Gen Xers (11%) or Baby Boomers (6%).
    - Family size does not have an impact on interest in mixing leisure and business travel as neither married Americans or Americans with children in their

households show increased interest compared to those not married or without children.

- Besides cost, past and future business travelers say their primary decision-making factor when booking business trips are direct flight options (48%), flight availability (45%), and flexible booking and cancellation policies (26%).

- When asked what has prevented them from traveling more for business in the past six months, past and future business travelers say too much work to justify travel (24%), health concerns related to COVID, flu, or RSV (20%), and restrictive company travel policies are the top reasons (16%).

- To encourage them to book more business travel in the next six months, American business travelers would like to see companies' encouraging travel for client meetings or conferences (39%), increased flight availability and direct flight options (33%), and an increased demand from clients for in-person meetings (30%).

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U.S. Travel Association Consumer Quarterly Tracker – Q1 2023
Conducted by Ipsos' KnowledgePanel®
A survey of the American general population (ages 18+)
Interview dates: January 13 - January 22, 2023
Number of interviews: 1,189
Number of Gen Z interviews: 84
Number of Millennial interivews: 280
Number of Gen X interviews: 271
Number of Baby Boomer interviews: 554
Number of voter interviews: 868
Number of past or future business traveler interviews: 324

Margin of error for the total sample: +/- 3.20 percentage points at the 95% confidence level

NOTE: All results show percentages among all respondents, unless otherwise labeled. Reduced bases are unweighted values.

*NOTE: * = less than 0.5%, - = no respondents, ** = Small base size*

Annotated Questionnaire:

S3. **[Asked if employed]** On average, how often do you travel for business?

	All Employed Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=737)*	*(N=54**)*	*(N=222)*	*(N=229)*	*(N=232)*	*(N=557)*	*(N=324)*
At least once a week	3%	3%	2%	2%	4%	3%	7%
1 to 3 times per month	3%	4%	3%	2%	3%	3%	10%
Once a month	2%	1%	2%	3%	2%	3%	9%
Once a quarter	4%	2%	4%	5%	2%	4%	12%
A few times each year	15%	5%	15%	17%	19%	19%	45%
Once a year	12%	3%	15%	15%	10%	14%	10%
Never	61%	82%	59%	55%	61%	53%	6%
Skipped	*	-	*	-	*	*	-

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S4. **[Asked if employed]** In the past 12 months, please indicate if any of your business trips included any of the following. Please select all that apply.

	All Employed Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=737)*	*(N=54**)*	*(N=222)*	*(N=229)*	*(N=232)*	*(N=557)*	*(N=324)*
An overnight stay in a hotel	23%	6%	22%	31%	24%	29%	70%
Domestic travel	22%	12%	24%	23%	23%	26%	58%
Same day travel (depart and return on the same day without an overnight stay)	18%	15%	17%	17%	24%	22%	39%
Attending a conference or convention	17%	5%	18%	20%	19%	21%	42%
Driving to meet with clients, customers or suppliers in their office or business location	14%	7%	13%	16%	15%	16%	33%
Driving to attend a conference, convention, or trade show	13%	6%	12%	16%	14%	15%	32%
Flying to attend a conference, convention or trade show	10%	2%	10%	11%	11%	13%	30%
Visiting multiple cities/destinations before returning home for either leisure or business	6%	-	6%	7%	7%	8%	22%
Flying to meet with customers, suppliers or other stakeholders	6%	1%	9%	6%	6%	8%	23%
Changing your travel itinerary during your trip due to changes in your business schedule	5%	2%	6%	4%	5%	6%	18%

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S4. **[Asked if employed]** In the past 12 months, please indicate if any of your business trips included any of the following. Please select all that apply. *(continued)*

	All Employed Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=737)*	*(N=54**)*	*(N=222)*	*(N=229)*	*(N=232)*	*(N=557)*	*(N=324)*
Changing your travel itinerary due to interruptions caused by Airlines, hotels or rental car companies	5%	1%	6%	6%	3%	5%	15%
Extending your business trip to enjoy a location for leisure activities	5%	-	7%	6%	5%	6%	16%
International travel	4%	-	5%	5%	2%	5%	13%
An overnight stay in an alternative accommodation (e.g. corporate apartment, home-share, etc.)	2%	1%	2%	3%	3%	3%	9%
Skipped	50%	67%	50%	46%	48%	45%	4%

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S11. **[Asked if employed]** Do you plan to travel for business purposes in the next 6 months?

	All Employed Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=737)*	*(N=54**)*	*(N=222)*	*(N=229)*	*(N=232)*	*(N=557)*	*(N=324)*
Yes	22%	9%	23%	24%	23%	28%	85%
No	63%	71%	63%	59%	64%	59%	5%
Don't know	15%	18%	13%	17%	13%	13%	9%
Skipped	*	2%	1%	-	-	*	-

S8. Have you traveled for leisure purposes in the past 12 months? This trip must have included traveling at least 50 miles from your home and include staying in a hotel, rental property, or home share for at least one night.

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Yes	59%	54%	58%	69%	56%	68%	82%
No	39%	42%	38%	31%	43%	31%	17%
Don't know	1%	3%	3%	-	*	1%	1%
Skipped	1%	1%	1%	-	*	*	-

S9. Do you plan to travel for leisure purposes in the next 6 months? This trip must include traveling at least 50 miles from your home and include staying in a hotel, rental property, or home share for at least one night.

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Yes	52%	44%	48%	61%	53%	62%	78%
No	34%	44%	37%	26%	33%	27%	13%
Don't know	13%	12%	14%	13%	13%	11%	9%
Skipped	*	1%	1%	-	-	-	-

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S10. **[ASKED IF S9 = YES]** Which of the following best describes your travel plans for your upcoming leisure travels? Please select all that apply.

	Americans with upcoming leisure travel	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=684)*	*(N=38**)*	*(N=155)*	*(N=179)*	*(N=312)*	*(N=554)*	*(N=251)*
Plan to travel by plane	53%	59%	60%	58%	43%	55%	64%
Plan to travel by car / RV	67%	54%	62%	70%	71%	68%	65%
Plan to travel by train	6%	9%	4%	8%	4%	6%	6%
Other	4%	2%	4%	3%	5%	3%	3%
Skipped	1%	1%	1%	*	2%	-	1%

Q1. Thinking of your household's financial wellbeing, how would you rate your financial status in the following time frames?

Total Excellent/Good Summary

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
In the past 3 months	48%	35%	40%	46%	58%	56%	69%
Currently	47%	34%	39%	47%	57%	56%	66%
In the next three months	49%	41%	41%	51%	57%	57%	69%

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Q1. Thinking of your household's financial wellbeing, how would you rate your financial status in the following time frames? *(continued)*

a. In the past 3 months

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Excellent	18%	15%	14%	17%	21%	21%	28%
Good	30%	20%	27%	29%	37%	35%	41%
Average	26%	32%	26%	28%	23%	24%	14%
Fair	13%	12%	14%	14%	12%	12%	11%
Poor	11%	13%	17%	12%	6%	7%	5%
Don't know	2%	7%	2%	*	1%	1%	1%
Skipped	1%	1%	1%	-	*	*	-
Excellent/Good (Net)	*48%*	*35%*	*40%*	*46%*	*58%*	*56%*	*69%*
Fair/Poor (Net)	*24%*	*25%*	*30%*	*26%*	*18%*	*19%*	*16%*

b. Currently

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Excellent	17%	16%	13%	17%	21%	21%	29%
Good	30%	18%	26%	31%	36%	35%	37%
Average	24%	26%	27%	25%	22%	23%	15%
Fair	15%	19%	16%	14%	13%	13%	14%
Poor	10%	12%	15%	13%	5%	6%	4%
Don't know	2%	8%	2%	*	*	1%	1%
Skipped	2%	1%	2%	1%	2%	2%	1%
Excellent/Good (Net)	*47%*	*34%*	*39%*	*47%*	*57%*	*56%*	*66%*
Fair/Poor (Net)	*25%*	*31%*	*31%*	*27%*	*19%*	*19%*	*17%*

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Q1. Thinking of your household's financial wellbeing, how would you rate your financial status in the following time frames? *(continued)*

c. In the next three months

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Excellent	17%	15%	14%	18%	19%	19%	28%
Good	33%	26%	27%	33%	38%	38%	41%
Average	24%	24%	26%	23%	23%	23%	15%
Fair	13%	17%	13%	11%	13%	11%	11%
Poor	8%	7%	12%	11%	3%	5%	2%
Don't know	5%	11%	7%	4%	3%	3%	3%
Skipped	1%	1%	1%	-	*	*	-
Excellent/Good (Net)	*49%*	*41%*	*41%*	*51%*	*57%*	*57%*	*69%*
Fair/Poor (Net)	*21%*	*23%*	*25%*	*22%*	*16%*	*16%*	*14%*

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Q2. How concerned are you, if at all, about each of the following issues.

Total Very/Somewhat Concerned Summary

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Inflation/Rising costs	86%	79%	86%	89%	87%	88%	87%
Potential economic recession	79%	72%	78%	81%	81%	82%	79%
Political divisiveness	76%	68%	67%	78%	85%	86%	82%
Rising interest rates	67%	69%	68%	67%	66%	68%	66%
The current price of gasoline	66%	62%	58%	69%	71%	66%	55%
Health of yourself and immediate family members	61%	59%	54%	62%	66%	61%	48%
Depleting household savings	60%	60%	62%	63%	57%	58%	49%
Rising household debt	59%	59%	62%	65%	54%	56%	50%
Immigration	51%	38%	35%	49%	67%	57%	44%
Personal safety	46%	44%	43%	45%	50%	44%	38%
Losing your job	21%	22%	28%	29%	11%	18%	21%

a. Inflation/Rising costs

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	50%	44%	49%	54%	51%	50%	45%
Somewhat concerned	36%	35%	37%	35%	37%	38%	42%
Not too concerned	10%	14%	9%	9%	10%	10%	11%
Not at all concerned	3%	5%	3%	1%	3%	2%	3%
Skipped	1%	2%	2%	-	*	*	-
Concerned (Net)	*86%*	*79%*	*86%*	*89%*	*87%*	*88%*	*87%*
Not concerned (Net)	*13%*	*19%*	*12%*	*11%*	*13%*	*12%*	*13%*

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Q2. How concerned are you, if at all, about each of the following issues. *(Continued)*

b. Potential economic recession

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	34%	31%	33%	34%	36%	35%	30%
Somewhat concerned	45%	41%	45%	47%	46%	46%	48%
Not too concerned	14%	16%	12%	16%	14%	14%	16%
Not at all concerned	6%	10%	8%	2%	4%	4%	6%
Skipped	1%	2%	2%	-	*	*	-
Concerned (Net)	79%	72%	78%	81%	81%	82%	*79%*
Not concerned (Net)	20%	26%	20%	19%	18%	18%	*21%*

c. Rising interest rates

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	31%	26%	31%	32%	33%	31%	29%
Somewhat concerned	36%	44%	37%	35%	34%	37%	37%
Not too concerned	23%	18%	21%	26%	23%	23%	25%
Not at all concerned	9%	10%	9%	6%	10%	8%	9%
Skipped	1%	2%	2%	1%	1%	1%	-
Concerned (Net)	*67%*	*69%*	*68%*	*67%*	*66%*	*68%*	*66%*
Not concerned (Net)	*32%*	*29%*	*30%*	*32%*	*33%*	*31%*	*34%*

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Q2. How concerned are you, if at all, about each of the following issues. *(Continued)*

d. Losing your job

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	7%	10%	10%	9%	3%	5%	5%
Somewhat concerned	14%	12%	19%	21%	8%	13%	16%
Not too concerned	29%	34%	34%	40%	17%	29%	44%
Not at all concerned	48%	42%	36%	31%	69%	52%	36%
Skipped	2%	2%	2%	-	3%	1%	-
Concerned (Net)	*21%*	*22%*	*28%*	*29%*	*11%*	*18%*	*21%*
Not concerned (Net)	*77%*	*76%*	*70%*	*71%*	*86%*	*81%*	*79%*

e. Depleting household savings

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	26%	17%	32%	27%	24%	25%	18%
Somewhat concerned	34%	43%	31%	36%	33%	33%	31%
Not too concerned	25%	26%	23%	26%	27%	27%	32%
Not at all concerned	14%	12%	13%	12%	16%	15%	18%
Skipped	1%	2%	2%	-	1%	1%	*
Concerned (Net)	*60%*	*60%*	*62%*	*63%*	*57%*	*58%*	*49%*
Not concerned (Net)	*39%*	*38%*	*36%*	*37%*	*43%*	*42%*	*50%*

TOPLINE AND METHODOLOGY

Q2. How concerned are you, if at all, about each of the following issues. *(Continued)*

f. Rising household debt

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	25%	20%	30%	30%	21%	22%	16%
Somewhat concerned	34%	39%	32%	34%	33%	34%	34%
Not too concerned	24%	21%	21%	23%	28%	27%	29%
Not at all concerned	16%	18%	15%	12%	18%	17%	21%
Skipped	1%	2%	2%	-	1%	1%	-
Concerned (Net)	*59%*	*59%*	*62%*	*65%*	*54%*	*56%*	*50%*
Not concerned (Net)	*40%*	*39%*	*36%*	*35%*	*45%*	*44%*	*50%*

g. Immigration

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	26%	13%	15%	24%	39%	32%	23%
Somewhat concerned	25%	25%	19%	25%	28%	24%	21%
Not too concerned	25%	29%	30%	26%	20%	22%	31%
Not at all concerned	23%	31%	34%	24%	12%	21%	25%
Skipped	1%	2%	2%	1%	1%	1%	-
Concerned (Net)	*51%*	*38%*	*35%*	*49%*	*67%*	*57%*	*44%*
Not concerned (Net)	*48%*	*60%*	*64%*	*50%*	*32%*	*43%*	*56%*

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TOPLINE AND METHODOLOGY

Q2. How concerned are you, if at all, about each of the following issues. *(Continued)*

h. Personal safety

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	13%	14%	14%	8%	14%	11%	10%
Somewhat concerned	34%	30%	29%	37%	36%	33%	28%
Not too concerned	39%	34%	38%	45%	38%	42%	42%
Not at all concerned	14%	18%	17%	10%	12%	14%	20%
Skipped	1%	4%	2%	-	*	*	-
Concerned (Net)	*46%*	*44%*	*43%*	*45%*	*50%*	*44%*	*38%*
Not concerned (Net)	*53%*	*52%*	*55%*	*55%*	*50%*	*56%*	*62%*

i. Political divisiveness

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	37%	16%	27%	36%	50%	47%	42%
Somewhat concerned	40%	52%	39%	43%	35%	39%	39%
Not too concerned	13%	15%	20%	12%	9%	10%	12%
Not at all concerned	9%	15%	12%	9%	5%	4%	7%
Skipped	1%	2%	2%	1%	1%	1%	-
Concerned (Net)	*76%*	*68%*	*67%*	*78%*	*85%*	*86%*	*82%*
Not concerned (Net)	*23%*	*30%*	*31%*	*21%*	*15%*	*14%*	*18%*

TOPLINE AND METHODOLOGY

Q2. How concerned are you, if at all, about each of the following issues. *(Continued)*

j. Health of yourself and immediate family members

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	21%	16%	19%	24%	23%	20%	13%
Somewhat concerned	40%	42%	35%	38%	44%	41%	35%
Not too concerned	30%	24%	33%	33%	27%	32%	39%
Not at all concerned	8%	14%	11%	5%	6%	7%	13%
Skipped	1%	3%	2%	-	*	*	-
Concerned (Net)	*61%*	*59%*	*54%*	*62%*	*66%*	*61%*	*48%*
Not concerned (Net)	*38%*	*38%*	*44%*	*38%*	*34%*	*39%*	*52%*

k. The current price of gasoline

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very concerned	31%	27%	26%	36%	33%	31%	27%
Somewhat concerned	35%	35%	32%	33%	38%	35%	28%
Not too concerned	24%	23%	29%	24%	20%	25%	32%
Not at all concerned	9%	13%	11%	7%	8%	9%	13%
Skipped	1%	2%	2%	-	*	*	-
Concerned (Net)	*66%*	*62%*	*58%*	*69%*	*71%*	*66%*	*55%*
Not concerned (Net)	*33%*	*36%*	*40%*	*31%*	*29%*	*34%*	*45%*

TOPLINE AND METHODOLOGY

Q3. How, if at all, do you expect your overall household spending in each of the following categories to change over the next three months?

Total Increase Spending Summary

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Home maintenance or improvement	23%	13%	18%	22%	31%	27%	30%
Travel for leisure	19%	17%	19%	20%	20%	22%	25%
Money put towards savings	19%	27%	22%	22%	14%	18%	30%
Outdoor recreation, activities, etc.	10%	11%	10%	12%	9%	11%	15%
Dining out and entertainment outside the home	8%	7%	7%	8%	10%	9%	9%
Home entertainment (i.e. streaming services, gaming, etc.)	6%	3%	6%	8%	6%	6%	6%
Non-essential purchases (e.g. sports equipment, apparel, jewelry, etc.)	6%	3%	8%	9%	4%	7%	8%

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GAME CHANGERS

TOPLINE AND METHODOLOGY

Q3. How, if at all, do you expect your overall household spending in each of the following categories to change over the next three months? *(Continued)*

a. Dining out and entertainment outside the home

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Increase spending significantly	1%	1%	*	1%	2%	1%	1%
Increase spending slightly	7%	6%	6%	7%	8%	8%	8%
Spending will not change	43%	38%	41%	42%	47%	48%	48%
Decrease spending slightly	24%	27%	26%	25%	22%	25%	26%
Decrease spending significantly	17%	13%	18%	20%	16%	16%	14%
Don't know	6%	13%	7%	5%	4%	3%	4%
Skipped	1%	2%	1%	-	*	-	-
Increase spending (Net)	*8%*	*7%*	*7%*	*8%*	*10%*	*9%*	*9%*
Decrease spending (Net)	*41%*	*40%*	*43%*	*45%*	*38%*	*41%*	*39%*

b. Home entertainment (i.e. streaming services, gaming, etc.)

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Increase spending significantly	1%	-	1%	1%	1%	*	1%
Increase spending slightly	5%	3%	5%	7%	5%	5%	5%
Spending will not change	56%	53%	55%	55%	57%	61%	63%
Decrease spending slightly	18%	12%	22%	22%	15%	17%	20%
Decrease spending significantly	10%	10%	7%	9%	13%	10%	8%
Don't know	10%	20%	9%	7%	8%	5%	3%
Skipped	1%	2%	2%	-	1%	*	-
Increase spending (Net)	*6%*	*3%*	*6%*	*8%*	*6%*	*6%*	*6%*
Decrease spending (Net)	*28%*	*22%*	*28%*	*31%*	*28%*	*27%*	*28%*

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TOPLINE AND METHODOLOGY

Q3. How, if at all, do you expect your overall household spending in each of the following categories to change over the next three months? *(Continued)*

c. Home maintenance or improvement

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Increase spending significantly	3%	2%	3%	3%	3%	4%	6%
Increase spending slightly	20%	12%	15%	20%	27%	24%	24%
Spending will not change	43%	43%	45%	49%	39%	45%	46%
Decrease spending slightly	11%	10%	12%	10%	12%	12%	11%
Decrease spending significantly	9%	9%	9%	10%	9%	8%	9%
Don't know	12%	22%	13%	9%	8%	6%	5%
Skipped	1%	2%	2%	-	2%	1%	-
Increase spending (Net)	*23%*	*13%*	*18%*	*22%*	*31%*	*27%*	*30%*
Decrease spending (Net)	*20%*	*19%*	*21%*	*20%*	*21%*	*21%*	*19%*

d. Travel for leisure

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Increase spending significantly	3%	3%	3%	3%	3%	3%	4%
Increase spending slightly	16%	13%	16%	17%	17%	19%	21%
Spending will not change	39%	31%	35%	43%	41%	43%	45%
Decrease spending slightly	16%	15%	19%	13%	16%	16%	15%
Decrease spending significantly	15%	18%	16%	15%	13%	13%	11%
Don't know	10%	17%	10%	8%	10%	5%	3%
Skipped	1%	2%	1%	*	*	*	*
Increase spending (Net)	*19%*	*17%*	*19%*	*20%*	*20%*	*22%*	*25%*
Decrease spending (Net)	*31%*	*34%*	*35%*	*28%*	*28%*	*29%*	*26%*

TOPLINE AND METHODOLOGY

Q3. How, if at all, do you expect your overall household spending in each of the following categories to change over the next three months? *(Continued)*

e. Outdoor recreation, activities, etc.

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Increase spending significantly	1%	1%	1%	1%	2%	1%	2%
Increase spending slightly	9%	10%	9%	12%	7%	10%	13%
Spending will not change	53%	36%	55%	56%	56%	58%	58%
Decrease spending slightly	13%	18%	10%	15%	13%	13%	14%
Decrease spending significantly	12%	12%	15%	9%	13%	11%	9%
Don't know	10%	21%	8%	8%	9%	7%	4%
Skipped	1%	2%	1%	-	1%	*	-
Increase spending (Net)	*10%*	*11%*	*10%*	*12%*	*9%*	*11%*	*15%*
Decrease spending (Net)	*26%*	*30%*	*25%*	*24%*	*26%*	*24%*	*23%*

f. Money put towards savings

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Increase spending significantly	3%	5%	4%	4%	2%	3%	5%
Increase spending slightly	16%	21%	18%	18%	12%	15%	25%
Spending will not change	42%	32%	38%	38%	49%	45%	43%
Decrease spending slightly	18%	16%	17%	19%	18%	20%	18%
Decrease spending significantly	11%	8%	12%	11%	11%	10%	6%
Don't know	10%	16%	10%	9%	9%	6%	4%
Skipped	1%	2%	2%	-	*	*	-
Increase spending (Net)	*19%*	*27%*	*22%*	*22%*	*14%*	*18%*	*30%*
Decrease spending (Net)	*28%*	*24%*	*29%*	*30%*	*28%*	*30%*	*23%*

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TOPLINE AND METHODOLOGY

Q3. How, if at all, do you expect your overall household spending in each of the following categories to change over the next three months? *(Continued)*

g. Non-essential purchases (e.g. sports equipment, apparel, jewelry, etc.)

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Increase spending significantly	1%	-	1%	2%	1%	1%	1%
Increase spending slightly	5%	3%	6%	7%	3%	6%	7%
Spending will not change	41%	30%	42%	38%	45%	44%	45%
Decrease spending slightly	21%	26%	21%	26%	18%	20%	24%
Decrease spending significantly	22%	18%	21%	21%	25%	24%	20%
Don't know	9%	21%	8%	6%	7%	4%	3%
Skipped	1%	2%	1%	-	*	*	-
Increase spending (Net)	*6%*	*3%*	*8%*	*9%*	*4%*	*7%*	*8%*
Decrease spending (Net)	*44%*	*44%*	*42%*	*47%*	*43%*	*44%*	*44%*

Q4. If you were to receive a lump sum of $2,500, which of the following items are you most likely to spend it on? Please select your top three items.

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Savings	62%	65%	61%	65%	60%	64%	67%
Home improvements	31%	17%	26%	31%	39%	34%	30%
Vacation or leisure travel	23%	24%	21%	24%	25%	27%	25%
Personal car or other form of transportation	13%	18%	14%	13%	10%	10%	7%
Dining out	9%	20%	8%	6%	9%	7%	7%
Electronics, streaming services, etc.	6%	13%	9%	3%	4%	5%	6%
Live entertainment such as concerts, sporting events, arts and culture	4%	8%	4%	5%	3%	4%	6%
Apparel and jewelry	3%	9%	3%	2%	3%	3%	3%
Sporting equipment, home exercise equipment, etc.	2%	1%	1%	2%	2%	2%	3%
Other	16%	11%	22%	17%	14%	14%	15%
Skipped	1%	2%	2%	-	*	*	1%

TOPLINE AND METHODOLOGY

Q5. Which of the following best describes how you typically prioritize travel in your discretionary spending? Please select one statement, even if neither is exactly right.

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Travel is low on my list of priorities for spending and I do not travel frequently	37%	40%	32%	28%	44%	30%	17%
I like to travel and try to plan trips when I can, but it is not a priority for me to save for traveling	29%	33%	32%	30%	25%	31%	37%
Travel is important to me and I prioritize setting aside money for travel	20%	13%	18%	24%	21%	24%	27%
Travel would be higher on my list of priorities but for the cost, it is too much of a hassle right now	14%	13%	15%	18%	10%	13%	18%
Skipped	1%	1%	3%	-	*	1%	1%

Q6. Do you plan to travel for leisure more or less in 2023 than in 2022?

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Plan to travel more	23%	19%	27%	23%	23%	24%	33%
Plan to travel less	24%	23%	26%	22%	25%	23%	17%
Plan to the same amount as in 2022	51%	57%	45%	55%	52%	53%	49%
Skipped	1%	1%	2%	-	*	*	1%

TOPLINE AND METHODOLOGY

Q7. Thinking of your most recent experience traveling by AIR for leisure, how would you rate each of the following components of your travel experience?

Total Excellent/Good Summary

	Americans who travel by air	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*VARIES*	*VARIES*	*VARIES*	*VARIES*	*VARIES*	*VARIES*	*VARIES*
Ease of booking your flight	61%	57%	60%	64%	60%	64%	67%
Process of checking in for your flight	57%	61%	55%	65%	52%	60%	62%
Process of getting to the airport for your flight	54%	53%	49%	60%	56%	60%	60%
Variety of transportation to and from the airport	54%	55%	50%	54%	56%	57%	53%
Overall travel experience	53%	57%	51%	55%	53%	57%	54%
Experience with TSA employees (airport security)	50%	50%	48%	50%	53%	55%	56%
Experience within the airport once past security (accommodations, restaurants, entertainment, seating)	49%	46%	45%	52%	52%	53%	54%
Process of checking a bag	48%	67%	42%	48%	48%	52%	51%
Availability of parking at the airport	45%	43%	44%	51%	43%	52%	48%
Length of time getting through security	40%	41%	41%	46%	34%	45%	50%
In-flight comfort	31%	37%	29%	33%	29%	33%	34%

a. Ease of booking your flight

	Americans who travel by air	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=848)*	*(N=57**)*	*(N=212)*	*(N=216)*	*(N=363)*	*(N=657)*	*(N=289)*
Excellent	20%	23%	20%	22%	18%	23%	27%
Good	40%	34%	40%	41%	42%	41%	40%
Average	28%	31%	29%	25%	28%	25%	24%
Fair	7%	9%	5%	8%	7%	7%	7%
Poor	3%	2%	4%	3%	4%	3%	2%
Skipped	1%	1%	2%	1%	0%	1%	-
Excellent/Good	*61%*	*57%*	*60%*	*64%*	*60%*	*64%*	*67%*
Fair/Poor	*10%*	*11%*	*8%*	*10%*	*11%*	*10%*	*9%*

TOPLINE AND METHODOLOGY

Q7. Thinking of your most recent experience traveling by AIR for leisure, how would you rate each of the following components of your travel experience? *(Continued)*

b. Process of checking in for your flight

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=872)*	*(N=60**)*	*(N=219)*	*(N=217)*	*(N=376)*	*(N=674)*	*(N=291)*
Excellent	18%	20%	17%	21%	16%	19%	22%
Good	39%	40%	37%	44%	36%	41%	40%
Average	27%	24%	29%	18%	32%	26%	24%
Fair	10%	13%	8%	10%	11%	9%	11%
Poor	4%	1%	5%	6%	3%	3%	2%
Skipped	2%	1%	3%	1%	1%	1%	-
Excellent/Good	*57%*	*61%*	*55%*	*65%*	*52%*	*60%*	*62%*
Fair/Poor	*14%*	*14%*	*13%*	*16%*	*15%*	*12%*	*13%*

c. In-flight comfort

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=864)*	*(N=58**)*	*(N=218)*	*(N=216)*	*(N=372)*	*(N=666)*	*(N=288)*
Excellent	6%	9%	7%	5%	6%	7%	7%
Good	25%	28%	22%	28%	24%	26%	27%
Average	41%	34%	46%	39%	39%	39%	39%
Fair	17%	23%	13%	17%	18%	16%	14%
Poor	10%	5%	10%	11%	11%	11%	13%
Skipped	2%	1%	2%	1%	2%	1%	-
Excellent/Good	*31%*	*37%*	*29%*	*33%*	*29%*	*33%*	*34%*
Fair/Poor	*27%*	*28%*	*22%*	*28%*	*30%*	*27%*	*27%*

TOPLINE AND METHODOLOGY

Q7. Thinking of your most recent experience traveling by AIR for leisure, how would you rate each of the following components of your travel experience? *(Continued)*

d. Length of time getting through security

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=875)*	*(N=60**)*	*(N=220)*	*(N=216)*	*(N=379)*	*(N=675)*	*(N=291)*
Excellent	13%	12%	14%	14%	10%	14%	18%
Good	27%	30%	27%	32%	23%	31%	32%
Average	34%	30%	34%	28%	39%	31%	26%
Fair	15%	19%	14%	13%	16%	15%	11%
Poor	9%	6%	8%	13%	9%	8%	11%
Skipped	2%	3%	3%	1%	2%	1%	1%
Excellent/Good	*40%*	*41%*	*41%*	*46%*	*34%*	*45%*	*50%*
Fair/Poor	*24%*	*25%*	*23%*	*25%*	*25%*	*23%*	*22%*

e. Experience with TSA employees (airport security)

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=865)*	*(N=59**)*	*(N=218)*	*(N=214)*	*(N=374)*	*(N=667)*	*(N=290)*
Excellent	14%	15%	13%	10%	17%	15%	15%
Good	36%	35%	35%	40%	36%	40%	41%
Average	30%	20%	33%	34%	28%	29%	29%
Fair	11%	21%	9%	6%	12%	8%	8%
Poor	7%	5%	7%	9%	6%	7%	7%
Skipped	2%	4%	3%	1%	1%	1%	-
Excellent/Good	*50%*	*50%*	*48%*	*50%*	*53%*	*55%*	*56%*
Fair/Poor	*18%*	*26%*	*16%*	*15%*	*18%*	*15%*	*15%*

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TOPLINE AND METHODOLOGY

Q7. Thinking of your most recent experience traveling by AIR for leisure, how would you rate each of the following components of your travel experience? *(Continued)*

f. Experience within the airport once past security

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=854)*	*(N=59**)*	*(N=217)*	*(N=213)*	*(N=365)*	*(N=661)*	*(N=287)*
Excellent	10%	13%	7%	9%	11%	11%	11%
Good	40%	32%	38%	43%	41%	42%	43%
Average	36%	34%	41%	34%	34%	33%	33%
Fair	10%	18%	7%	8%	11%	10%	10%
Poor	4%	2%	5%	5%	2%	3%	3%
Skipped	1%	1%	2%	-	1%	*	-
Excellent/Good	*49%*	*46%*	*45%*	*52%*	*52%*	*53%*	*54%*
Fair/Poor	*14%*	*19%*	*12%*	*14%*	*13%*	*13%*	*12%*

g. Process of getting to the airport for your flight

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=865)*	*(N=59**)*	*(N=218)*	*(N=216)*	*(N=372)*	*(N=667)*	*(N=291)*
Excellent	16%	17%	11%	18%	19%	17%	16%
Good	38%	35%	38%	42%	37%	43%	44%
Average	30%	31%	34%	25%	30%	26%	26%
Fair	10%	15%	10%	9%	10%	9%	11%
Poor	4%	-	4%	6%	3%	4%	2%
Skipped	1%	2%	2%	-	1%	1%	*
Excellent/Good	*54%*	*53%*	*49%*	*60%*	*56%*	*60%*	*60%*
Fair/Poor	*14%*	*15%*	*14%*	*15%*	*13%*	*13%*	*13%*

TOPLINE AND METHODOLOGY

Q7. Thinking of your most recent experience traveling by AIR for leisure, how would you rate each of the following components of your travel experience? *(Continued)*

h. Process of checking a bag

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=750)*	*(N=50**)*	*(N=183)*	*(N=186)*	*(N=331)*	*(N=577)*	*(N=236)*
Excellent	13%	16%	13%	11%	14%	15%	18%
Good	35%	50%	29%	36%	34%	37%	33%
Average	34%	17%	41%	34%	33%	31%	28%
Fair	9%	12%	5%	8%	11%	9%	13%
Poor	7%	2%	9%	11%	6%	8%	7%
Skipped	2%	2%	3%	-	2%	1%	1%
Excellent/Good	*48%*	*67%*	*42%*	*48%*	*48%*	*52%*	*51%*
Fair/Poor	*16%*	*14%*	*14%*	*19%*	*17%*	*16%*	*20%*

i. Availability of parking at the airport

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=611)*	*(N=40**)*	*(N=159)*	*(N=160)*	*(N=252)*	*(N=470)*	*(N=219)*
Excellent	12%	11%	12%	12%	12%	16%	14%
Good	33%	32%	33%	39%	31%	36%	34%
Average	31%	26%	32%	29%	32%	26%	29%
Fair	13%	16%	11%	13%	16%	13%	10%
Poor	9%	12%	9%	7%	8%	8%	12%
Skipped	2%	4%	3%	-	1%	2%	1%
Excellent/Good	*45%*	*43%*	*44%*	*51%*	*43%*	*52%*	*48%*
Fair/Poor	*22%*	*28%*	*20%*	*20%*	*23%*	*20%*	*21%*

TOPLINE AND METHODOLOGY

Q7. Thinking of your most recent experience traveling by AIR for leisure, how would you rate each of the following components of your travel experience? *(Continued)*

j. Variety of transportation to and from the airport

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=777)*	*(N=50**)*	*(N=201)*	*(N=193)*	*(N=333)*	*(N=597)*	*(N=265)*
Excellent	14%	16%	11%	15%	16%	15%	14%
Good	40%	39%	40%	39%	40%	42%	38%
Average	29%	32%	33%	27%	27%	26%	31%
Fair	10%	9%	9%	12%	9%	9%	12%
Poor	6%	2%	6%	8%	7%	7%	5%
Skipped	1%	2%	3%	-	1%	1%	-
Excellent/Good	*54%*	*55%*	*50%*	*54%*	*56%*	*57%*	*53%*
Fair/Poor	*16%*	*11%*	*14%*	*19%*	*16%*	*16%*	*17%*

k. Overall travel experience

	Americans who travel by air	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=875)*	*(N=62**)*	*(N=218)*	*(N=217)*	*(N=378)*	*(N=676)*	*(N=292)*
Excellent	13%	14%	11%	16%	12%	14%	13%
Good	41%	43%	40%	39%	41%	43%	41%
Average	29%	25%	33%	27%	28%	26%	28%
Fair	10%	12%	8%	9%	13%	9%	10%
Poor	6%	-	6%	9%	5%	6%	7%
Skipped	2%	6%	2%	1%	*	1%	1%
Excellent/Good	*53%*	*57%*	*51%*	*55%*	*53%*	*57%*	*54%*
Fair/Poor	*16%*	*12%*	*14%*	*17%*	*18%*	*16%*	*17%*

TOPLINE AND METHODOLOGY

Q8. **[Asked if overall travel experience not rated excellent in Q7]** You mentioned your overall travel experience from your most recent air travel was not excellent. Not considering the cost of your most recent trip, what were the main reasons for your less than satisfactory travel experience? Please rank your top 3 reasons where 1 is most important, 2 is the second most important, and 3 is the third most important.

Ranked as First, Second, or Third Most Important Summary

	Americans who travel by air with less than excellent experiences	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=756)*	*(N=48**)*	*(N=191)*	*(N=187)*	*(N=330)*	*(N=584)*	*(N=257)*
Crowding and congestion	58%	44%	52%	64%	63%	61%	59%
Flight delays or cancellations	44%	44%	42%	41%	48%	44%	47%
Cumbersome travel logistics	31%	33%	32%	33%	28%	33%	34%
Airport security process	31%	40%	26%	31%	31%	31%	29%
Amount of time in transit to the airport	24%	21%	28%	24%	21%	23%	21%
Negative/Inefficient airport experience	24%	23%	28%	26%	20%	25%	31%
Poor customer service	19%	18%	16%	21%	19%	20%	21%
Safety concerns	13%	8%	14%	10%	15%	11%	11%
Checked baggage lost	7%	22%	7%	3%	4%	3%	6%
Other	15%	7%	16%	16%	17%	16%	17%

TOPLINE AND METHODOLOGY

Q9. Why do you say **[INSERT TOP 2 ANSWERS FROM Q14]** are the aspect you least enjoy of the travel process? What could the airport or airline do to improve this issue for you? Please be specific**.**

Open end responses provided separately

Q10. To what extent do you agree or disagree with the following statements regarding traveling for leisure in the next 6 months?

Total Agree Summary

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
I will be taking vacation(s) in order to prioritize my health and well-being	37%	35%	41%	47%	30%	40%	55%
Taking time off to travel is more important than ever	35%	34%	39%	42%	27%	38%	50%
I would be traveling for leisure more in the next 6 months but much of the travel experience is a hassle today	29%	25%	24%	32%	32%	33%	33%
I will be prioritizing more sustainable travel including supporting local businesses, reducing waste, reducing carbon emissions, etc.	24%	37%	27%	21%	18%	23%	27%
Travel will be a top priority in my personal budget in 2023	22%	18%	21%	26%	21%	25%	30%
I will be prioritizing more "leisure" trips (trips which combine leisure travel with work) in 2023 and the ability to work remote	11%	12%	18%	11%	6%	13%	27%

TOPLINE AND METHODOLOGY

Q10. To what extent do you agree or disagree with the following statements regarding traveling for leisure in the next 6 months? *(Continued)*

a. Taking time off to travel is more important than ever

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Strongly agree	12%	8%	13%	17%	9%	13%	16%
Somewhat agree	23%	26%	25%	26%	18%	25%	34%
Neither agree nor disagree	37%	38%	35%	33%	42%	35%	33%
Somewhat disagree	11%	7%	13%	7%	12%	11%	8%
Strongly disagree	16%	18%	12%	18%	18%	15%	9%
Skipped	1%	3%	2%	-	1%	*	-
Agree (Net)	*35%*	*34%*	*39%*	*42%*	*27%*	*38%*	*50%*
Disagree (Net)	*27%*	*25%*	*25%*	*25%*	*30%*	*26%*	*17%*

b. I would be traveling for leisure more in the next 6 months but much of the travel experience is a hassle today

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Strongly agree	7%	3%	6%	9%	8%	8%	11%
Somewhat agree	22%	22%	19%	23%	24%	25%	23%
Neither agree nor disagree	40%	40%	41%	40%	39%	37%	40%
Somewhat disagree	15%	17%	17%	13%	14%	17%	16%
Strongly disagree	15%	16%	16%	15%	13%	13%	11%
Skipped	1%	3%	2%	-	1%	*	-
Agree (Net)	*29%*	*25%*	*24%*	*32%*	*32%*	*33%*	*33%*
Disagree (Net)	*30%*	*33%*	*33%*	*28%*	*27%*	*30%*	*27%*

TOPLINE AND METHODOLOGY

Q10. To what extent do you agree or disagree with the following statements regarding traveling for leisure in the next 6 months? *(Continued)*

c. Travel will be a top priority in my personal budget in 2023

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Strongly agree	6%	3%	4%	9%	5%	6%	8%
Somewhat agree	16%	15%	17%	17%	16%	19%	22%
Neither agree nor disagree	29%	29%	31%	25%	29%	27%	32%
Somewhat disagree	18%	17%	17%	18%	19%	19%	18%
Strongly disagree	30%	34%	28%	31%	30%	28%	20%
Skipped	1%	2%	2%	-	1%	*	-
Agree (Net)	*22%*	*18%*	*21%*	*26%*	*21%*	*25%*	*30%*
Disagree (Net)	*48%*	*51%*	*46%*	*49%*	*49%*	*47%*	*38%*

d. I will be taking vacation(s) in order to prioritize my health and well-being

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Strongly agree	11%	7%	12%	18%	8%	13%	19%
Somewhat agree	26%	28%	30%	29%	22%	27%	36%
Neither agree nor disagree	35%	32%	36%	31%	38%	33%	27%
Somewhat disagree	11%	10%	9%	8%	14%	13%	11%
Strongly disagree	16%	21%	13%	14%	17%	14%	7%
Skipped	1%	2%	2%	*	1%	1%	-
Agree (Net)	*37%*	*35%*	*41%*	*47%*	*30%*	*40%*	*55%*
Disagree (Net)	*27%*	*31%*	*21%*	*22%*	*31%*	*27%*	*18%*

TOPLINE AND METHODOLOGY

Q10. To what extent do you agree or disagree with the following statements regarding traveling for leisure in the next 6 months? *(Continued)*

e. I will be prioritizing more sustainable travel including supporting local businesses, reducing waste, reducing carbon emissions, etc.

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Strongly agree	5%	6%	5%	5%	5%	5%	9%
Somewhat agree	18%	31%	22%	16%	13%	19%	18%
Neither agree nor disagree	47%	34%	48%	46%	50%	47%	42%
Somewhat disagree	10%	8%	9%	10%	11%	11%	15%
Strongly disagree	18%	19%	14%	23%	19%	18%	17%
Skipped	1%	2%	2%	-	2%	1%	-
Agree (Net)	*24%*	*37%*	*27%*	*21%*	*18%*	*23%*	*27%*
Disagree (Net)	*28%*	*27%*	*23%*	*33%*	*30%*	*29%*	*31%*

f. I will be prioritizing more "leisure" trips (trips which combine leisure travel with work) in 2023 and the ability to work remotely

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Strongly agree	2%	2%	2%	4%	1%	2%	6%
Somewhat agree	9%	9%	16%	7%	5%	10%	21%
Neither agree nor disagree	35%	38%	39%	29%	35%	31%	35%
Somewhat disagree	12%	17%	7%	15%	11%	12%	17%
Strongly disagree	40%	31%	33%	44%	47%	43%	20%
Skipped	2%	2%	2%	1%	1%	1%	*
Agree (Net)	*11%*	*12%*	*18%*	*11%*	*6%*	*13%*	*27%*
Disagree (Net)	*52%*	*48%*	*40%*	*59%*	*58%*	*56%*	*37%*

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TOPLINE AND METHODOLOGY

Q11. In the past six months which of the following, if any, have kept you from traveling MORE by AIR for leisure purposes? Please select your top three reasons.

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Personal financial reasons	38%	47%	44%	43%	28%	33%	30%
Health concerns (COVID, flu, RSV etc.)	24%	20%	18%	23%	29%	24%	17%
Possibility of flight cancellations and delays	17%	7%	15%	19%	20%	21%	20%
You or members of your travel party prefer to drive to destination	17%	16%	13%	15%	21%	18%	13%
Crowds – too many people traveling	16%	12%	14%	18%	17%	17%	19%
Not enough PTO/vacation time from your job	14%	20%	21%	17%	7%	13%	16%
Airline and airport hassles such as checking baggage, security lines, comfort, etc.	14%	10%	11%	14%	16%	16%	20%
Unpredictable weather and possible natural disasters	7%	7%	4%	7%	8%	8%	7%
Lack of flight availability	7%	10%	8%	8%	6%	9%	12%
Planning and booking air travel is too confusing and daunting	5%	7%	5%	5%	4%	5%	5%
Safety concerns (e.g. crime and gun violence in the airport or plane)	4%	9%	2%	3%	4%	3%	3%
Lack of sustainable travel options (e.g. carbon emission offsetting, sustainable aviation fuels)	2%	4%	2%	3%	1%	3%	4%
Other	11%	6%	10%	10%	15%	12%	11%
I have traveled by AIR as much as I wanted to in the past 6 months	15%	17%	13%	14%	17%	17%	22%
Skipped	5%	7%	7%	3%	2%	3%	2%

TOPLINE AND METHODOLOGY

Q12. In the past six months, have you avoided/cancelled/delayed planning or taking a leisure trip by car, either driving by yourself or with others?

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Yes	23%	22%	30%	24%	18%	22%	20%
No	75%	75%	68%	76%	81%	78%	80%
Skipped	1%	3%	2%	-	1%	-	-

Q13. **[Asked if Q12 = Yes]** Which of the following, if any, were reasons you delayed or cancelled your trip by car? Please select your top 3 reasons.

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=252)*	*(N=18**)*	*(N=76**)*	*(N=59**)*	*(N=99)*	*(N=174)*	*(N=61**)*
Personal financial reasons	44%	31%	48%	37%	50%	38%	28%
Health concerns (COVID, flu, RSV, etc.)	30%	26%	24%	29%	40%	30%	23%
Unpredictable weather and possible natural disasters	17%	14%	12%	14%	24%	15%	20%
Crowds – too many people traveling	15%	27%	9%	19%	15%	14%	21%
Not enough PTO/vacation time	15%	15%	20%	18%	7%	14%	25%
Too much time spent in transit	13%	14%	10%	16%	16%	17%	17%
Too much traffic/congestion on the roads	12%	-	12%	12%	15%	14%	25%
Planning and booking travel is too confusing and daunting	4%	5%	7%	-	1%	4%	2%
Lack of sustainable travel options (e.g. EV charging stations, EV rental car options, etc.)	4%	6%	7%	-	3%	2%	4%
Safety concerns (e.g. crime and gun violence)	3%	7%	1%	3%	5%	3%	4%
None of the above	17%	34%	21%	7%	11%	18%	16%
Skipped	*	-	-	2%	-	1%	-

TOPLINE AND METHODOLOGY

Q14. Of the following, what are the top 3 factors that would motivate you to take more leisure trips by AIR in the next 6 months? Please select your top 3 responses.

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Increased flight availability and direct flights	31%	22%	30%	36%	31%	35%	43%
Travel discounts and loyalty programs	29%	31%	31%	29%	26%	30%	33%
Flexible cancellation policies	26%	22%	27%	28%	25%	29%	32%
Improved air travel comfort	25%	20%	24%	25%	26%	27%	32%
More seamless and efficient airport experience	15%	18%	16%	17%	12%	17%	18%
Improved airport experience past security	9%	11%	8%	8%	9%	9%	8%
Increased transit options to/from the airport for departure and arrival of flights	5%	7%	6%	4%	5%	6%	7%
Increased ability to travel while working remotely	5%	7%	9%	7%	2%	5%	10%
Sustainable travel options including carbon offsetting, sustainable aviation fuels, reducing single use plastics, etc.	4%	7%	4%	4%	3%	5%	5%
None of the above	31%	32%	24%	28%	38%	28%	18%
Skipped	1%	1%	3%	*	*	1%	-

TOPLINE AND METHODOLOGY

Q15. **[Asked if not planning leisure travel in next 6 months]** You mentioned you do not have any upcoming leisure travel plans in the next 6 months. What are the main reasons why you do NOT have any leisure travel planned? Please select all that apply.

	Americans not travelling in next 6 months	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=505)*	*(N=46**)*	*(N=125)*	*(N=92)*	*(N=242)*	*(N=314)*	*(N=73**)*
Personal financial reasons	45%	51%	48%	54%	35%	40%	25%
I have no interest or reason to travel for leisure in the next few months	40%	45%	31%	28%	51%	40%	37%
Personal health concerns	14%	9%	8%	11%	23%	18%	11%
Work related concerns (e.g. workload too heavy, lack of coverage, too hard to get away)	13%	7%	17%	18%	9%	16%	31%
Crowds – too many people traveling	10%	10%	11%	15%	8%	11%	10%
Airline and airport hassles such as checking baggage, security lines, comfort, etc.	7%	2%	5%	13%	8%	11%	10%
Unpredictable weather and possible natural disasters	7%	4%	12%	9%	4%	6%	5%
Possibility of flight cancellations and delays	6%	2%	8%	8%	5%	8%	14%
Safety concerns (e.g. crime and gun violence)	4%	6%	3%	8%	3%	4%	3%
Planning and booking travel is too confusing and daunting	3%	5%	3%	2%	3%	4%	3%
Lack of flight availability	2%	-	2%	4%	1%	3%	6%
Lack of sustainable travel options (e.g. EV charging stations, EV rental car options, sustainable aviation fuels, etc.)	1%	2%	1%	3%	*	1%	3%
Other	9%	4%	10%	11%	10%	13%	14%
Skipped	4%	4%	9%	-	2%	2%	1%

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TOPLINE AND METHODOLOGY

Q16. **[Asked if past or future business traveler]** Over the past six months which of the following, if any, have kept you from traveling MORE for business? Please select your top 3 reasons.

	All Past or Future Business Traveler	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**
Base Size	*(N=324)*	*(N=13**)*	*(N=99)*	*(N=106)*	*(N=106)*	*(N=279)*
Too much work to do in the office/at home to justify traveling	24%	7%	26%	25%	25%	25%
Health concerns (COVID, flu, RSV etc.)	20%	-	18%	24%	25%	20%
Restrictive company travel policies	16%	25%	12%	16%	18%	17%
Clients prefer to meet on video calls instead of in-person meetings	16%	12%	15%	17%	16%	16%
Possibility of flight cancellations and delays	13%	-	16%	14%	11%	13%
Lack of support from company for business related travel	12%	13%	10%	15%	13%	11%
Crowds – too many people traveling	11%	6%	9%	12%	13%	11%
Limited flight options, direct flights, etc.	10%	-	14%	13%	4%	10%
Airline and airport hassles such checking baggage, security lines, comfort, etc.	7%	6%	9%	6%	8%	8%
Lack of clients in the office to meet with face to face	6%	-	7%	7%	7%	7%
Limited airport accessibility/lack of connectivity between home and airport	5%	12%	7%	4%	2%	5%
Safety concerns (e.g. crime and gun violence)	4%	6%	1%	6%	4%	4%
Increased company focus/scrutiny on reducing carbon emissions and other sustainability measures	4%	25%	6%	-	1%	4%
Other	19%	10%	13%	23%	24%	20%
Skipped	14%	41%	18%	8%	10%	13%

TOPLINE AND METHODOLOGY

Q17. **[Asked if past or future business traveler]** Aside from cost, what are your top decision-making factors when booking a business trip? Please select your top 3 factors.

	All Past or Future Business Traveler	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**
Base Size	*(N=324)*	*(N=13**)*	*(N=99)*	*(N=106)*	*(N=106)*	*(N=279)*
Direct flight options	48%	24%	50%	45%	53%	47%
Flight availability	45%	36%	42%	46%	49%	46%
Flexible booking and cancellation policies	26%	13%	25%	23%	33%	25%
Hotel availability	23%	27%	24%	23%	20%	21%
Appealing destination to stay longer for vacation/leisure purposes	20%	14%	24%	22%	13%	21%
Client interest in face-to-face meetings	19%	12%	19%	17%	21%	19%
Destination where you feel safe and welcome	15%	17%	10%	16%	22%	16%
Ability to use travel loyalty points and incentives from airlines	11%	10%	15%	9%	9%	13%
Ability to use travel loyalty points and incentives from hotels, home shares, and executive housing partners	7%	7%	1%	12%	9%	7%
Alternative accommodation availability such as home-share, corporate apartment, etc.	4%	-	6%	4%	3%	4%
Sustainable travel options including electronic vehicles, minimizing transportation, sustainable aviation fuels, reducing single use plastics, etc.	2%	7%	1%	2%	3%	2%
Other	8%	23%	4%	10%	8%	9%
Skipped	6%	13%	9%	3%	3%	5%

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Q18. **[Asked if past or future business traveler]** Of the following, what are the top 3 factors that would motivate you to take MORE business trips this coming year? Please select your top 3 factors.

	All Past or Future Business Traveler	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**
Base Size	*(N=324)*	*(N=13**)*	*(N=99)*	*(N=106)*	*(N=106)*	*(N=279)*
My company encouraging me to travel to see clients/customers, attend conferences, conventions, etc.	39%	28%	36%	48%	35%	43%
Increased flight availability and direct flight options	33%	25%	34%	33%	35%	34%
Clients/customers wanting to have more in-person meetings and less meetings on video calls	30%	20%	27%	30%	36%	31%
Improved air travel comfort	27%	25%	28%	25%	28%	27%
People I am interested in meeting with are also traveling to attend the meetings or conferences in person	24%	29%	21%	28%	21%	25%
Ability to book and change air travel more seamlessly	20%	-	18%	21%	27%	21%
Travel loyalty points and incentives	17%	22%	16%	18%	16%	17%
Hotel availability	11%	6%	13%	12%	9%	11%
More seamless and efficient airport experience, such as using biometrics and contactless travel, expeditated security process, etc.	10%	-	9%	13%	9%	10%
Sustainable travel options including electronic vehicles, minimizing transportation, sustainable aviation fuels, reducing single use plastics, etc.	8%	19%	8%	6%	8%	8%
Improved airport experience past security	7%	11%	5%	10%	4%	6%
Skipped	10%	29%	10%	8%	7%	9%

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TOPLINE AND METHODOLOGY

Q19. What is your level of familiarity with each of the following expeditated airport clearance programs?

a. TSA PreCheck and/or Global Entry

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
I am enrolled	15%	11%	16%	16%	15%	20%	32%
I am enrolled but my family is not	2%	4%	2%	2%	1%	2%	3%
Familiar but not enrolled	49%	44%	49%	55%	47%	52%	53%
Never heard of the program	33%	39%	30%	27%	36%	26%	12%
Skipped	1%	1%	2%	*	1%	*	-
Enrolled (Net)	*17%*	*15%*	*18%*	*18%*	*16%*	*22%*	*35%*

b. CLEAR

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
I am enrolled	2%	2%	3%	2%	2%	3%	7%
I am enrolled but my family is not	1%	5%	2%	1%	*	*	2%
Familiar but not enrolled	30%	27%	35%	35%	24%	35%	51%
Never heard of the program	65%	65%	59%	62%	72%	61%	41%
Skipped	1%	1%	2%	*	1%	1%	-
Enrolled (Net)	*3%*	*7%*	*5%*	*3%*	*2%*	*3%*	*9%*

TOPLINE AND METHODOLOGY

Q20. **[Asked if not enrolled in TSA PreCheck or CLEAR programs]** Why are you not currently enrolled in TSA PreCheck or CLEAR expeditated airport clearance programs? Please select all that apply.

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=916)*	*(N=69**)*	*(N=205)*	*(N=207)*	*(N=435)*	*(N=649)*	*(N=204)*
Do not travel frequently enough for it to be useful	57%	54%	54%	51%	64%	63%	57%
Not familiar enough with the program	22%	22%	23%	26%	19%	20%	20%
Cost	15%	7%	17%	20%	14%	17%	26%
Not sure how to enroll	12%	14%	13%	11%	12%	13%	16%
Application process is a hassle	7%	6%	7%	11%	4%	8%	14%
Privacy concerns	4%	2%	3%	9%	2%	5%	11%
None of the above	19%	26%	19%	18%	17%	13%	11%
Skipped	*	-	-	-	*	*	-

Q21. How comfortable, if at all, would you be with sharing your biometric data such as fingerprints, facial recognition, etc. with TSA in each of the following instances if it resulted in a more seamless, secure, and efficient travel experience?

Total Comfortable Summary

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
To board an airplane at the gate	52%	39%	50%	58%	53%	56%	62%
Get through airport security	52%	38%	54%	57%	51%	57%	63%
To check in for a flight	51%	40%	48%	58%	52%	55%	63%
Touchless ticketing technology	50%	35%	49%	57%	51%	55%	61%
To check bags	47%	32%	46%	51%	50%	52%	59%

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TOPLINE AND METHODOLOGY

Q21. How comfortable, if at all, would you be with sharing your biometric data such as fingerprints, facial recognition, etc. with TSA in each of the following instances if it resulted in a more seamless, secure, and efficient travel experience? *(Continued)*

a. To board an airplane at the gate

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very uncomfortable	17%	15%	15%	19%	17%	19%	17%
Somewhat uncomfortable	15%	19%	18%	11%	13%	14%	15%
Somewhat comfortable	27%	28%	24%	29%	27%	27%	25%
Very comfortable	25%	12%	26%	28%	26%	29%	37%
Don't know	16%	25%	15%	13%	17%	10%	5%
Skipped	1%	1%	2%	-	*	*	-
Comfortable (Net)	*52%*	*39%*	*50%*	*58%*	*53%*	*56%*	*62%*
Uncomfortable (Net)	*31%*	*35%*	*33%*	*30%*	*30%*	*33%*	*32%*

b. Get through airport security

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very uncomfortable	16%	18%	12%	18%	18%	19%	16%
Somewhat uncomfortable	15%	19%	16%	11%	14%	13%	15%
Somewhat comfortable	27%	24%	25%	30%	28%	29%	25%
Very comfortable	24%	14%	28%	27%	23%	28%	38%
Don't know	17%	23%	17%	13%	16%	10%	6%
Skipped	1%	1%	2%	1%	*	1%	-
Comfortable (Net)	*52%*	*38%*	*54%*	*57%*	*51%*	*57%*	*63%*
Uncomfortable (Net)	*31%*	*38%*	*28%*	*29%*	*32%*	*32%*	*30%*

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TOPLINE AND METHODOLOGY

Q21. How comfortable, if at all, would you be with sharing your biometric data such as fingerprints, facial recognition, etc. with TSA in each of the following instances if it resulted in a more seamless, secure, and efficient travel experience? *(Continued)*

c. Touchless ticketing technology

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very uncomfortable	17%	19%	15%	17%	16%	18%	18%
Somewhat uncomfortable	15%	22%	18%	10%	13%	13%	15%
Somewhat comfortable	26%	18%	25%	26%	30%	28%	25%
Very comfortable	24%	18%	24%	31%	21%	27%	36%
Don't know	18%	22%	17%	15%	20%	13%	6%
Skipped	1%	1%	2%	*	*	1%	1%
Comfortable (Net)	*50%*	*35%*	*49%*	*57%*	*51%*	*55%*	*61%*
Uncomfortable (Net)	*31%*	*41%*	*33%*	*27%*	*29%*	*31%*	*33%*

d. To check bags

	All Americans	Gen Z (18-25)	Millennial (26-41)	Gen X (42-55)	Baby Boomer (56+)	Voter in past three elections	Past or Future Business Traveler
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very uncomfortable	19%	19%	16%	20%	19%	20%	19%
Somewhat uncomfortable	16%	26%	19%	14%	13%	16%	16%
Somewhat comfortable	26%	19%	24%	26%	29%	27%	27%
Very comfortable	21%	13%	22%	25%	21%	25%	32%
Don't know	17%	23%	16%	15%	17%	11%	6%
Skipped	1%	1%	2%	-	1%	1%	-
Comfortable (Net)	*47%*	*32%*	*46%*	*51%*	*50%*	*52%*	*59%*
Uncomfortable (Net)	*35%*	*45%*	*35%*	*34%*	*32%*	*36%*	*35%*

TOPLINE AND METHODOLOGY

Q21. How comfortable, if at all, would you be with sharing your biometric data such as fingerprints, facial recognition, etc. with TSA in each of the following instances if it resulted in a more seamless, secure, and efficient travel experience? *(Continued)*

e. To check in for a flight

	All Americans	**Gen Z (18-25)**	**Millennial (26-41)**	**Gen X (42-55)**	**Baby Boomer (56+)**	**Voter in past three elections**	**Past or Future Business Traveler**
Base Size	*(N=1,189)*	*(N=84**)*	*(N=280)*	*(N=271)*	*(N=554)*	*(N=868)*	*(N=324)*
Very uncomfortable	17%	18%	16%	17%	17%	19%	17%
Somewhat uncomfortable	15%	18%	20%	12%	14%	15%	14%
Somewhat comfortable	27%	25%	22%	30%	29%	28%	26%
Very comfortable	24%	15%	26%	29%	23%	27%	37%
Don't know	16%	23%	15%	13%	17%	10%	6%
Skipped	1%	1%	2%	-	*	1%	1%
Comfortable (Net)	*51%*	*40%*	*48%*	*58%*	*52%*	*55%*	*63%*
Uncomfortable (Net)	*32%*	*36%*	*35%*	*29%*	*31%*	*34%*	*31%*

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About the Study

This Ipsos Poll was conducted on behalf of the U.S. Travel Association January 13 - January 22, 2022, by Ipsos using the probability-based KnowledgePanel® – a division of Ipsos. This poll is based on a nationally representative probability sample of 1,189 general population adults age 18 or older. The sample includes 84 Gen Z respondents (ages 18-25), 280 Millennial respondents (ages 26-41), 271 Gen X respondents (ages 42 to 55), 554 Baby Boomer respondents (ages 56+), 868 voters in past three elections, and 324 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, 35-44, 45-54, 55-64, 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 3.20 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 1.29. 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 total slightly higher or lower than 100%. In questions that permit multiple responses, columns may total substantially more than 100%, depending on the number of different responses offered by each respondent.

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About Ipsos

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 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. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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