

## **Key Findings From A Survey Of Air Travelers**

Peter D. Hart Research and the Winston Group

*From May 6 to 13, 2008, Peter D. Hart Research and the Winston Group interviewed 1,003 air travelers (defined as at least one roundtrip by air in the past 12 months) and for a single question only, 1,214 non-air travelers (people who have not taken a flight in the past 12 months). Often in this report, results are presented for the important subgroups of frequent travelers (defined as three or more roundtrips per year) and very frequent travelers (five or more roundtrips per year), or infrequent travelers, (just one or two roundtrips per year). The statistical margin of sampling error for the survey as a whole is  $\pm 3.2$  percentage points. The margin of error for subgroups will be larger. What follows is a summary of the key findings from the survey.*

### **The struggling air transportation system is frustrating travelers.**

The strains in the American air travel system—including long lines for check in and security screening, flight delays, cancellations, longer flight times, baggage issues, and other problems—are beginning to take a toll on the traveling public and the frequent travelers that are most important to the travel industry are the most likely to be concerned about the problems.

Looking at all Americans who have taken at least one air trip in the past 12 months, two-thirds (66%) are satisfied with “the entire air travel system of airports and airlines including security, boarding, the in-flight experience, and baggage” and one-third is dissatisfied. This level of dissatisfaction, while potentially alarming by itself, does not paint the full picture of an emerging break down in traveler support for the system because frequent travelers are much more likely to be frustrated travelers.

By 72% to 28% infrequent travelers express satisfaction with the air travel system, although just 12% are completely satisfied while 60% are mostly satisfied. On the other hand, frequent travelers who take three flights per year are substantially less satisfied, as 58% say they are satisfied and 41% are dissatisfied. Among the group of travelers taking as many as five trips per year, dissatisfaction (48%) nearly equals satisfaction (51%).

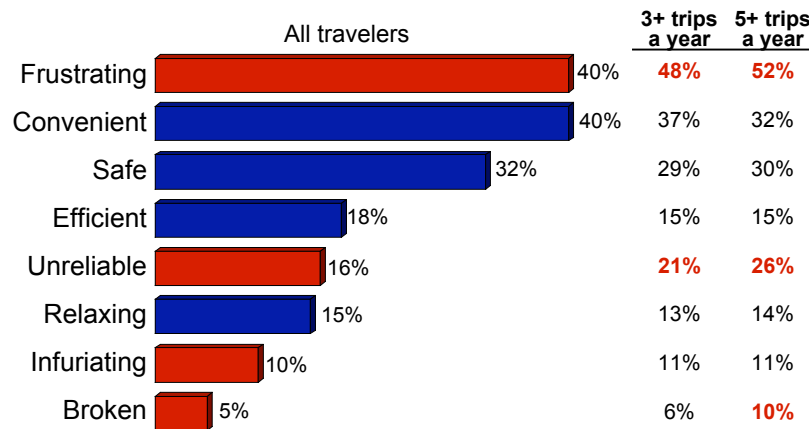
**Many Frequent Travelers Are Dissatisfied With The Air Travel System**

	Travel Frequency Roundtrips Per 12 Months			
	<b>1 to 2 Trips</b>	<b>3 or More Trips</b>	<b>5 or More Trips</b>	<b>All Travelers</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Satisfied	72	58	51	66
Dissatisfied	28	41	48	33

Although travelers appreciate the convenience (40%) and safety (32%) of the air travel system for long-distance journeys, equally as many passengers describe air travel as “frustrating” (40%) as say it is “convenient.” Again, the more often someone travels by air, the more likely they are to find fault with the air travel system, and for travelers who fly more than three times per year, the negative outweighs the positive, as “frustrating” tops the list of descriptors. Frequent travelers are more likely than are infrequent travelers to describe the system as frustrating (48% versus 33%), and unreliable (21% versus 12%). Very frequent travelers are the most frustrated (52%) and more than one-quarter of them describe the system as unreliable.

**Frustration Highest Among Frequent Travelers**

*Which two/three of these words come to mind when you think of traveling by air, including the airport experience?*



**Getting there is the least enjoyable.**

Compared with other parts of the travel experience including renting cars, staying at a motel, hotel, or resort, and eating meals away from home, the air travel experience is the least pleasant part of taking a trip. A 56% majority of travelers say that getting through the airports and flying to and from their destination is a bad part (40%) or the worst part of travel (16%).

**Is this one of the best things about traveling, a very good thing, a somewhat good thing, a somewhat bad thing, a very bad thing, or one of the worst things about travel?**

*(proportion who say somewhat bad or worse)*

	Travel Frequency Roundtrips Per 12 Months			
	<b>1 to 2 Trips %</b>	<b>3 or More Trips %</b>	<b>5 or More Trips %</b>	<b>All Travelers %</b>
Getting through the airports and flying to and from a destination	52	61	62	56
Renting a car	18	20	18	19
Eating meals away from home	18	18	20	18
Staying at a hotel, motel, or resort	6	10	13	8
Visiting museums, attractions and activities at the destination	4	3	3	3
Visiting other cities or areas of the country	2	3	2	2
Being with family members	1	2	4	2

Flight delays and cancellations are, by far, the most disliked parts of traveling by air. A 53% majority of all travelers (and 60% of people who take five or more trips per year) say that flight delays and cancellations are the aspects of the travel process that most needs to be improved. Getting through security screening is another area that more than one-third (36%) of travelers choose as being most in need of improvement.

Flight cancellations and delays are common, especially among frequent fliers. Twenty-nine percent (29%) of travelers report having a flight cancelled in the past 12 months. This number increases significantly with travel frequency: 41% of frequent fliers and a majority of very frequent fliers (55%) report having at least one flight cancelled in the past 12 months.

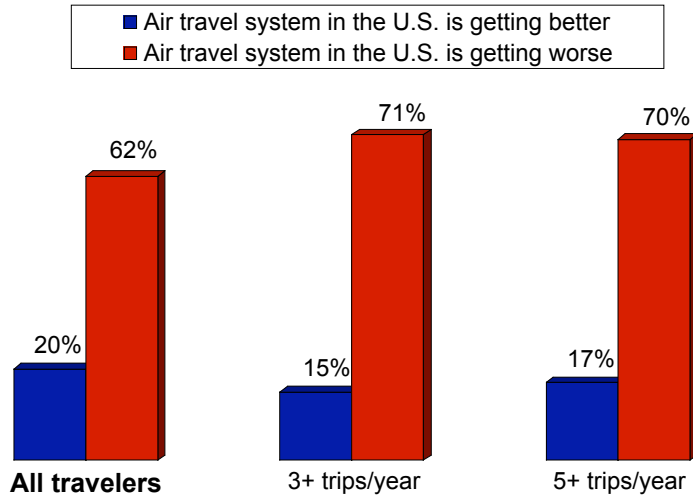
Having to wait in an airport for an hour or more because of a delayed flight is a more widespread problem among all groups of air travelers. Three in five travelers report hour-plus waits due to flight delays in the past year. Delays are especially

problematic for frequent travelers. While half (49%) of infrequent travelers have experienced delays in the past year, nearly three-quarters (73%) of frequent travelers and four in five (82%) very frequent travelers have been stuck waiting in an airport due to delays.

### **Travelers see problems growing worse.**

While the most frequent travelers are most aware of the current problems affecting the air travel system, travelers at all frequency levels see the system as on a declining path. By 62% to 20% all travelers say the air travel system is getting worse, including infrequent travelers (56% worse, 23% better) as well as frequent travelers taking at least three trips per year (71% worse, 15% better).

## **Most Think The System Is Getting Worse**



Concerns about efficiency and reliability are driving this pessimism about the direction of the air travel system. While security (62% better, 18% worse) and safety (57% better, 18% worse) are seen as improving, efficiency (29% better, 51% worse) and reliability (25% better, 54% worse) are seen as worsening. The sense that the efficiency and reliability of the system are on the decline is stronger as travel frequency increases. While a plurality of infrequent travelers say the efficiency of the system is getting worse (44%), that proportion rises to three in five (60%) frequent travelers and nearly two-thirds (64%) of very frequent travelers. We see the same trend with the reliability of the air travel system: 48% of infrequent travelers think reliability is getting worse compared with 61% of frequent travelers and 64% of very frequent travelers.

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**Efficiency And Reliability**

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	Travel Frequency Roundtrips Per 12 Months			
	<b>1 to 2 Trips</b>	<b>3 or More Trips</b>	<b>5 or More Trips</b>	<b>All Travelers</b>
	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Efficiency is getting worse	44	60	64	51
Reliability is getting worse	48	61	64	54

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**The Economic Impact Of A Struggling Air Transportation System.**

Travelers believe that the economy is suffering from the woes of the air travel system. More than half of travelers think that air travel problems have a very major (21%) or fairly major (35%) impact on the U.S. economy. As it turns out, their suspicions are correct. Travel hassles, long lines, flight delays, and cancellations caused 41 million trips not to be taken last year, including 29 million leisure trips and 12 million business trips. This is a total cost to the travel industry of \$26.5 billion: \$9.4 billion to airlines, \$5.6 billion to hotels, \$3.1 billion to restaurants and \$4.2 billion in federal, state and local tax revenue.

Many travelers have avoided air travel due to problems with the air travel system and would take more trips if these problems were resolved. In the past year, 28% of travelers have chosen not to take a trip because problems with the air travel system made the trip seem like more of a hassle than it was worth. Forty-four percent (44%) of travelers say that they would take more trips each year if the hassles at the airport could be reduced or eliminated.

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**Proportion Who Avoided Trips In The Past Year  
Because Of Problems With Air Travel System**

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	Travel Frequency Roundtrips Per 12 Months			
	<b>1 to 2 Trips</b>	<b>3 or More Trips</b>	<b>5 or More Trips</b>	<b>All Travelers</b>
Have avoided trips	24%	33%	41%	28%
Mean number of trips avoided	1.0	1.7	2.6	1.3

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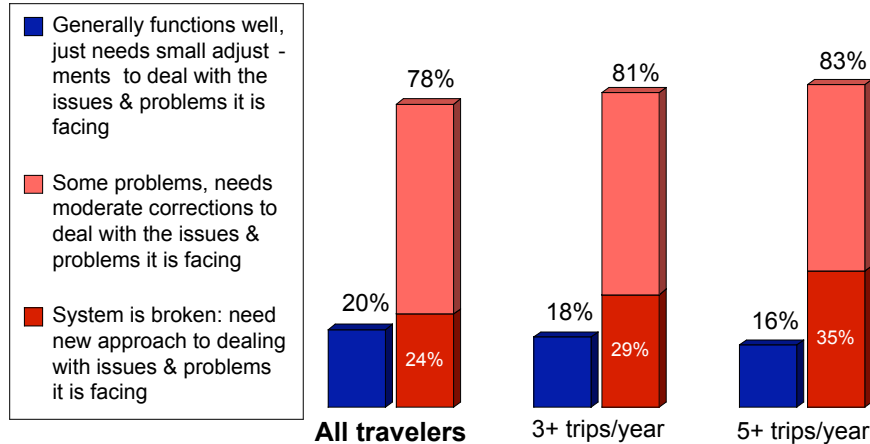
**Travelers see the need for change, but are pessimistic.**

Virtually no travelers say the air travel system in the United States is fine the way it is. Just one in five travelers thinks that the air travel system generally functions well and we just need to make small adjustments to deal with the issues and problems it is facing. The majority of travelers think the air travel system has some problems (54%) or is broken (24%). The more people travel by air, the more likely they are to say the system is broken. Twenty-one percent (21%) of infrequent

travelers, 29% of frequent travelers, and 35% of very frequent travelers say the system is broken and we need a new approach to dealing with the issues and problems it is facing.

## Most Call For At Least Moderate Corrections In Air Travel System

*Overall assessment of the U.S. air travel system*



Despite recognizing that the air travel system needs significant improvements, travelers are not confident that the airlines, airports, and the federal government will make the needed changes in the next few years. They are divided on how likely it is that changes will be made with half saying it is very (15%) or fairly (35%) likely and half saying that it is not too likely (32%) or not likely at all (15%). Travelers who are less familiar with the system are more optimistic (53% likely, 44% unlikely) than the most frequent travelers (41% likely, 58% unlikely).

Travelers want the airlines, the federal government, and airports to be involved in making the necessary improvements to the air travel system. Given the economic impact of problems with the air travel system, it makes sense that travelers see the need for an all-hands-on-deck approach to the solution, wanting all parties to do their part to make improvements. Two-thirds (68%) of travelers trust airlines to make improvements, and half trust the federal government (51%) and airports (48%) to make needed changes to the air travel system.

They also would like to see the presidential candidates pay more attention to the problems with the air travel system. While there may be a long list of issues that would draw a similar response but were not tested on this survey, a 65% majority of air travelers say the presidential candidates are paying too little attention to the problems with the air travel system. This includes 37%, who say they are paying much too little attention.