

SURVEY for January 2024

DOV_Sample
1=KnowledgePanel

Base: All respondents

DISP1 [DISP]

Thank you for agreeing to take this survey. This research is being conducted to understand how people think and feel about different topics.

Like all surveys, this survey may include some personal questions. This survey may include some questions about your thoughts on social and political issues. As a reminder, your responses are only ever used for research purposes only and will remain anonymous – results are reported only for groups, not for individuals. You can choose not to answer any question. Answering the questions means that you accept us collecting the data.

Base: all respondents

[ZEMPLOY]

QEMPLOY [Q]

How many hours do you usually work for pay or profit per week? Please include hours you work for pay or profit at all your jobs if you have more than one job. If none, enter "0". If less than an hour in a week, enter "1".

— — —

SCRIPTER: min.=0, max.=168. Show label to right of box: Hours per week. Do not allow decimals. Prompt following nonresponse. Create data only variable.

IF QEMPLOY \geq 35 ZEMPLOY = 1.

IF QEMPLOY \leq 34 AND QEMPLOY \geq 1 ZEMPLOY = 2.

IF QEMPLOY = 0 ZEMPLOY = 3.

Variable name: ZEMPLOY [S]

Variable Text: Current employment status

Response list:

1. Working full-time
2. Working part-time
3. Not working

Screener

Base: All respondents

S1. Have you ever flown on an airline?

1. Yes
2. No **[TERMINATE]**

[If refuse terminate]

Base: All respondents

S2. Have you flown on an airline within the past five years (2019-2023)?

1. Yes
2. No

Base: All respondents

S3. Did you fly on an airline in 2023?

1. Yes
2. No

Base: IF S3=YES, otherwise skip to q26

S4. In 2023, how many trips did you take on airlines for the following purposes? Please think about domestic and international trips separately, and count each roundtrip as one trip.

[INSERT NUMERIC TEXT BOX NEXT TO EACH WITH RANGE 0-31 AND PRE AUTO FILL WITH '0']
[SHOW DOMESTIC AND INTERNATIONAL ON TWO SEPARATE SCREENS, ROTATE]

1. Domestic – **Primarily** business purposes
2. Domestic – **Primarily** personal leisure purposes
3. Domestic – **Primarily** personal non-leisure purposes (e.g., traveling to school, attending a family event, funeral, medical matters)
4. International – **Primarily** business purposes
5. International – **Primarily** personal leisure purposes
6. International – **Primarily** personal non-leisure purposes (e.g., traveling to school, attending a family event, funeral, medical matters)

Base: IF S3= YES

S5. Here is the total number of trips you took on airlines in 2023. Is this correct?

[INSERT SPACE HERE]

[SHOW RESULTS FOR ALL SIX OPTIONS FROM S4, INCLUDING OPTIONS WITH '0']

1. Yes [CONTINUE]
2. No [RETURN TO S4, ALLOWING RESPONDENTS TO MODIFY ANSWERS PREVIOUSLY ENTERED] [ASK S5 AGAIN AND 'NO' THE SECOND TIME TERMINATE]
[IF TOTAL FOR S4 = 0 AND S5 = 'YES' THEN TERMINATE]
[IF RESPONDENT SKIPS S4 (NO NUMBERS FOR FLIGHTS IN S4) FOR THE SECOND TIME, TERMINATE].
IF RESPONDENT SKIPS S5, PROMPT AGAIN WITH Q5, IF THEY SKIP AGAIN, TERMINATE]

If S3=YES

1a. In 2023, On average, how many nights did you stay at your destination when you took the following types of trips?

[INSERT NUMERIC TEXT BOX NEXT TO EACH WITH RANGE 0-31 AND PRE AUTO FILL WITH '0']

Personal domestic travel [S4_2 OR S4_3 = 1 OR MORE]
Personal international travel [S4_5 OR S4_6= 1 OR MORE]
Business domestic travel [S4_1 = 1 OR MORE]
Business international travel [S4_4=1 OR MORE]

[MAIN QUESTIONNAIRE BEGINS]

Base: IF S3= Yes

2. For the next set of questions, we are going to ask you about your air travel experience over the course of 202-

[CREATE VARIABLE IF ANY PERSONAL& DOMESTIC FLIGHT S3=YES AND S4=1+ for DOMESTIC – PRIMARILY PERSONAL LEISURE PURPOSES AND/OR DOMESTIC – PRIMARILY PERSONAL NON-LEISURE PURPOSES (codes 2,3)

[CREATE VARIABLE IF ANY PERSONAL& INTERNATIONAL FLIGHT S3=YES AND S4=1+ for INTERNATIONAL – PRIMARILY PERSONAL LEISURE PURPOSES AND/OR INTERNATIONAL – PRIMARILY PERSONAL NON-LEISURE PURPOSES (codes 5,6)

[CREATE VARIABLE IF ANY BUSINESS & DOMESTIC FLIGHT S3=YES AND S4=1+ for DOMESTIC – PRIMARILY BUSINESS PURPOSES (code 1)

[CREATE VARIABLE IF ANY BUSINESS & INTERNATIONAL FLIGHT S3=YES AND S4=1+ for INTERNATIONAL – PRIMARILY BUSINESS PURPOSES (code 4)

Base: IF S3= YES

3. When flying, which resource do you typically use to **book your flight**?
(Select one)

[GRID ACROSS:-COLLAPSIBLE] [RANDOMIZE]

1. Airline website (on a computer)
2. Airline app (on a mobile device)
3. Online travel agencies (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair)
4. Traditional (brick and mortar) travel agency or corporate travel department
5. Airline reservation/ticketing agent
6. Other (please specify)[ANCHOR LAST]

[GRID DOWN]

[INSERT IF TRAVEL VARIABLE FOR PERSONAL & DOMESTIC] Personal domestic travel

[INSERT IF TRAVEL VARIABLE FOR PERSONAL & INT'L] Personal international travel

[INSERT IF TRAVEL VARIABLE FOR BUSINESS & DOMESTIC] Business domestic travel

[INSERT IF TRAVEL VARIABLE FOR BUSINESS & INT'L] Business international travel

Base: IF S3= YES

4. In choosing among flights from multiple airlines, which of the following criteria are most important to you? Please rank the following criteria, with 1 being the most important to you and 7 being the least important to you.

Prompt once if 7 items are not ranked: Your answer is important to use. Can you please rank all seven items.

[RANDOMIZE: INCLUDE NUMERIC TEXT BOXES: VALID RANGE 1-7: UNIQUE RESPONSES ONLY]

1. Departure/arrival time
2. Ticket price/value
3. Nonstop flight option (vs. connecting)
4. Availability/quality of food/beverage service
5. Availability/quality of inflight Wi-Fi/entertainment
6. Loyalty/frequent flyer program points/miles/perks

7. Seat comfort

Base: S4_2 or S4_5= 1 OR MORE

5. When traveling for **personal** reasons, which of the following options below do you generally consult when researching air travel options before making a final purchase? (please select all that apply)

[RANDOMIZE]

1. I visit one or more airline apps or websites
2. I use an online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair)
3. I use a metasearch engine (e.g., Google, Kayak)
4. I consult a traditional bricks-and-mortar travel agent
5. I contact an airline reservation agent via telephone
6. Other (please specify) [ANCHOR]

Base: IF S4_2 OR S4_5=1 OR MORE

6. When traveling for **personal** reasons, how many sites/agencies/companies do you typically visit/call when researching air travel options before making a final purchase?

1. One
2. Two
3. Three
4. Four or more

Base: IF S4_2 OR S4_5= 1 OR MORE

7. How much time do you typically spend researching air travel options for **personal** travel before making a purchase? (Select one)

1. 0-30 minutes
2. 31-60 minutes
3. 61-90 minutes
4. Over 90 minutes

Base: IF S3= YES

8. At any point in 2023, in exchange for a lower fare, did you purchase a ticket where seat selection and/or baggage (checked and/or carry-on) cost extra?

[ROTATE 1-3;3-1]

1. Yes, and I **was fully aware at the time of purchase** that those items would cost “extra.”
2. Yes, but I **was not aware at the time of purchase** that those items would cost “extra.”
3. No, I did not purchase such a ticket at any point in 2023.

Base: IF Q8= YES (1 or 2)

9. Would you consider purchasing such a ticket again?

[ROTATE 1-2;2-1]

1. Yes
2. No
3. Don't know

Base: If S3= Yes

10_D. When purchasing air travel online on your computer or mobile device, how important are each of the following?

[RANDOMIZE]

- a. App or website are easy to use
- b. Speed (from initial search to purchase)
- c. Simple, clutter-free design of app or website
- d. Quality customer service (e.g., modify itinerary post purchase, communicate with agent)
- e. Transparency, defined as the ability to make an informed purchase decision (i.e., clear information about price, schedule, services, are rules/policies, etc.)

[ROTATE SCALE 1-5;5-1]

1. Very important
2. Somewhat important
3. Neutral
4. Not very important
5. Not at all important

Base: If S3= Yes

10E. When shopping for air travel online, on the first page of search results, which of the following would you prefer to see?

[RANDOMIZE]

1. **Multiple** flight schedule options with information on optional services presented **after** you have selected a flight
2. **One** flight option only, with full information on all services (regardless of whether included or optional) offered by the airline on that flight
3. **Multiple** flight schedule options with available fares and pricing for all optional services for each flight option

Base: If S3= Yes

10F. When **searching/comparison-shopping** for air travel online, which of these options do you typically prefer?

[RANDOMIZE]

1. Airline website or mobile app
2. Online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair)
3. An aggregator/metasearch engine (e.g., Google Flights, Hopper, Kayak, Skyscanner)

Base: If S3= Yes

10G. When **purchasing** air travel online, which of these options do you typically prefer?

[ROTATE 1-2, 2-1]

1. Airline website or mobile app
2. Online travel agency (e.g., Priceline, Expedia/Orbitz/Travelocity, Hotwire, SeatGuru, CheapOair)

Base: IF S4_2 OR S4_3= 1 or more or S4_5 or S4_6=1 or more

11. When traveling for **personal** reasons, what form of payment do you typically use? (Select one)

[RANDOMIZE]

1. Airline affinity card (e.g., Alaska Airlines Visa Signature, JetBlue Card, United MileagePlus)
2. Other credit/charge cards (e.g., American Express, Discover, MasterCard, Visa)
- ~~3.~~ Debit card
4. Cash (travel agency or at the airport)
5. Other [ANCHOR]

Base: IF S3= Yes

12. In 2023, how did you most commonly check-in for trips?

[RANDOMIZE, SINGLE RESPONSE]

1. Mobile device/app
2. Airline website
3. Airport skycap (curbside)
4. Airport ticket counter
5. Other (please specify) [ANCHOR]

Base: IF S3= YES

14. Assuming all of these options were available to you, which is your typical means of getting to the airport? (Please select one)

[RANDOMIZE: ANCHOR OTHER]

1. Personal vehicle
2. Traditional taxi
3. Limousine or car service
4. Shared van (e.g., airport shuttle, hotel shuttle)
5. Ride-hailing service (e.g., Uber, Lyft, Via)
6. Public transit (e.g., bus, subway, train)
7. Other (e.g., walk, bicycle) **[ANCHOR]**

Base: IF S3= YES

15. At the gate, which type of boarding pass do you typically use?

[ROTATE 1-2:2-1]

1. Paper
2. Electronic (mobile app)

Base: If S3= Yes

15A. Would you support a federal regulation requiring airlines to compensate you for canceled or significantly delayed flights, irrespective of the cause (e.g., extreme weather, air traffic control, airline, security incident), **even if** it led to higher average ticket prices?

[ROTATE 1-2, 2-1]

1. Yes
2. No

Base: IF S3= YES

19. Thinking about your overall experience with air travel in 2023, how satisfied or dissatisfied are you?

[ROTATE; 1-5,5-1]

1. Very satisfied
2. Somewhat satisfied
3. Neutral
4. Somewhat dissatisfied
5. Very dissatisfied

Base: IF S3= YES

20. In 2023, on a scale of 1 to 5, how would you rate your **overall** satisfaction with each of the following?

RANDOMIZE

Shopping for/purchasing a ticket
Checking in for the flight
Getting through security
Boarding process

Reliability of on-time departure and arrival

Awaiting checked baggage upon arrival (if applicable)

Clearing immigration/customs **[SHOW IF S4_4 AND/OR S4_5 AND/OR S4_6= 1 OR MORE]**

[Accordion Grid, Flip 1-5;5-1]

5 -Very satisfied

4 -Somewhat satisfied

3 -Neutral

2 -Somewhat dissatisfied

1 -Very dissatisfied

Base: IF S4_1 OR S4_4 = 1 or more

22. In 2023, approximately how many airline trips did you take for each of the following business purposes?

[pulldown menu grid, allow answers 0-99]

[RANDOMIZE]

1. Sales and/or business development (i.e., securing new clients or projects)
2. Professional services / support of existing clients or customers
3. Conferences/conventions/industry meetings/trade shows
4. Intra-company (internal) meetings or training (between various offices/branches/regions)
5. Commuting (flying between home and work)

Base: IF S4_1 OR S4_4 = 1 or more

22a: Are you flying less/more/the same for business today than you did pre-Covid?

[REVERSE 1-3; 3-1]

More
Same
Less

Base: [IF 22a = "Less"]

22b. When do you envision getting back to the number of business trips (by air) you took pre-pandemic, if ever?

[REVERSE 1-3; 3-1]

2024
2025
2026 or beyond
Never [ANCHOR]

Base: S3=YES

Below are a few potential changes that may happen in the coming years for commercial air travel. Which of these potential changes would have the most positive impact on your traveling experience? Please rank the following from 1 – most positive impact to 5 – least positive impact

[DISPLAY RANKING BOXES 1-5; ONLY ALLOW RESPONSE TO BE USED ONCE, PROMPT RESPONDENT TO ANSWER IF SKIPPED]]

[RANDOMIZE]

1. Lower prices (fares/fees)
2. Better flight schedules
3. More comfortable seats
4. More room for carry-on luggage
5. Better Wi-Fi

Base: All respondents

26. Are you currently enrolled in any frequent flyer program, and do you have any status giving you extra privileges (like early boarding, lounge access, or free checked bags)?

[REVERSE 1-3, 3-1]

1. Yes, frequent flyer program member, but do not have elite status with any airline
2. Yes, have elite status with at least one airline frequent flyer program
3. No

Base: 26 = yes #1 or #2

17b. How many of each of the following do you have, if any?

Airline co-branded credit card

Travel rewards credit card (e.g., Chase Sapphire, Capital One Venture, AmEx Platinum)

Cash back credit card

Other affinity card (e.g., hotel, Amazon, major retailer) [ANCHOR]

Base: All respondents

28. Which of the following Department of Homeland Security (DHS) trusted traveler / expedited security-screening programs are you enrolled in? (Select one)

[ROTATE 1-2;2-1]

1. Global Entry, NEXUS or SENTRI
2. TSA PreCheck only (not Global Entry/NEXUS/SENTRI)
3. I am not enrolled in any of these

Base: All respondents

29. If biometric **facial** recognition were available for **domestic** flights and resulted in a speedier journey (e.g., checking in, going through security, boarding the aircraft) and a touchless experience, would you prefer that over using a traditional boarding pass and identity document (e.g., passport, driver's license)?

[ROTATE 1-3;3-1]

1. Yes, primarily for a speedier journey
2. Yes, primarily for a touchless experience
3. No
4. Don't know/Unsure

Base: IF S2= YES

31. In the past five years (2019-2023), **when traveling for personal reasons**, which of the following types of airlines did you fly? Please check all that apply

[RANDOMIZE 1-3]

1. American, Delta, United (U.S. global network airlines)
2. Alaska, Hawaiian, JetBlue, Southwest (U.S. low-cost or hybrid airlines)
3. Allegiant, Avelo, Breeze, Frontier, Spirit, Sun Country (U.S. ultra-low-cost airlines)
4. Silver Airways, Cape Air, or other U.S. airline [ANCHOR]
5. Air Canada, Aeromexico, British Airways, JAL, or other non-U.S. airlines [ANCHOR]

Base: IF S2= YES

31A. In 2024, for a **domestic** U.S. trip, on which of the following airlines do you expect to take the **majority** of flights?

[ROTATE 1-2, 2-1]

1. Alaska, American, Delta, Hawaiian, JetBlue, Southwest, United (U.S. global network airlines or low-cost, hybrid airlines)
2. Allegiant, Avelo, Breeze, Frontier, Silver, Spirit, Sun Country (U.S. ultra-low-cost airlines)
3. None of the above [ANCHOR]

Base: IF S2= YES

31b. Are you willing to pay a modestly higher ticket price to help airlines increasing the environmental sustainability of their day-to-day operations (e.g., use of sustainable aviation fuel / acquiring eco-friendly planes, recycling)? **[SELECT ONE]**

[ROTATE SCALE 1-4;4-1]

1. Yes, I'd pay up to \$5 more
2. Yes, I'd pay up to \$10 more
3. Yes, I'd pay up to \$20 more
4. Yes, I'd pay up to \$50 more
5. No – I wouldn't pay a penny more [ANCHOR]

Base: IF S2= YES

31C. Are you aware that North American airlines are investing in sustainable aviation fuel to lessen their carbon footprint?

[ROTATE 1-2;2-1]

1. Yes
2. No
3. Don't know/Unsure

Base: IF S2= YES

31D. At any point in 2023, did you purchase a carbon offset for your trip or make a donation to a fund for sustainable aviation fuel (SAF)?

[ROTATE 1-2;2-1]

1. Yes, I did this once
2. Yes, I did this for multiple trips
3. No, I did not do this

Base: IF S2= YES

33. What portion of U.S. greenhouse gas emissions do you think U.S. airlines are responsible for? **[SELECT ONE]**

[ROTATE 1-7;7-1]

1. 0 percent

2. 1-5 percent
3. 6-10 percent
4. 11-20 percent
5. 21-30 percent
6. 31-40 percent
7. More than 40 percent

Base: IF S2= YES

34. In the coming years, do you plan to limit/reduce how much you fly (e.g., fewer trips/miles) due to concerns about your carbon footprint? **[SELECT ONE]**

[ROTATE 1-2;2-1]

1. Yes
2. No
3. Unsure

Base: IF ZEMPLOY=1 OR 2 or Qemploy>0

35. Which of these best describes your current employment circumstances?

[ROTATE 1-2;2-1]

1. Working exclusively at place of employment (e.g., office, factory, restaurant, school)
2. Working exclusively remotely (anywhere other than office)
3. Working in a hybrid arrangement (i.e., some days at office and some days remote)

Base: IF Q35= 2 or 3 AND S4_2=1+ or S4_5= 1 or more

36. Which of the following best reflects your 2023 leisure travel?

[ROTATE 1-2;2-1]

I took more trips in 2023 for leisure because I have a flexible work arrangement
My work arrangement (remote/hybrid) did not impact how many leisure trips I took in 2023