

# 102023 - HOD FLASH (24 HOUR) SURVEY

## 102023 - HOD FLASH (24 HOUR) SURVEY

### Report Settings

Respondents:	Qualified Only
Additional Filter:	None
Table Set:	All
Percentage Base:	Total Answering
Stat Test Levels:	95 / 90 (z-test)
Stat Test Groups:	,B-E
Date Range:	(10/20/23 - 10/24/23)

### Segment Definitions

Total- All qualified respondents	(ALL)	n=1052
Adult Gen Z (18-26)	(dmAge.check('18-26'))	n=147
Millennials (27-41)	(dmAge.check('27-41'))	n=272
Gen X (42-57)	(dmAge.check('42-57'))	n=280
Boomers (58-76)	(dmAge.check('58-76'))	n=297

### Weighting

Total	nweight.q102023_24_hourprop.val	q102023_24_hourprop
-------	---------------------------------	---------------------

**QS1Q1: Have you done each of the following in the last 12 months?**

**Traveled by air (i.e., using a commercial airline)**

		<b>Generation (Age)</b>			
	Total- All qualified responde... A	Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=1052	N=147	N=272	N=280	N=297
<b>Total (Unweighted)</b>	N=1052	N=126	N=239	N=286	N=341
<b>Yes</b>	44%	49% E	53% E	49% E	33%
<b>No</b>	56%	51%	47%	51%	67% BCD

**Table Base:** U.S. RESPONDENTS

**QS1Q2: Which one of the following best describes your reasons for traveling by air (i.e., using a commercial airline) in the last 12 months?**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Only business travel</b>	2%	3% e	0%	4% e	0%
<b>Mostly business travel with some personal travel</b>	6%	8% e	8% e	5%	2%
<b>Both business travel and personal travel equally</b>	18%	25% E	27% dE	16% e	8%
<b>Mostly personal travel with some business travel</b>	11%	17%	9%	14%	9%
<b>Only personal travel</b>	63%	46%	56%	61% b	82% BCD

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q3: Which one of the following commercial airlines do you most prefer?**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Delta Air Lines</b>	26%	25%	33% d	22%	23%
<b>Southwest Airlines</b>	22%	13%	17%	27% bc	23%
<b>American Airlines</b>	20%	25%	16%	21%	23%
<b>United Airlines</b>	17%	27% D	18%	13%	16%
<b>JetBlue Airways</b>	5%	3%	5%	6%	4%
<b>Spirit Airlines</b>	4%	5%	6%	2%	3%
<b>Frontier Airlines</b>	2%	1%	2%	1%	1%
<b>Other, please specify</b>	2%	0%	3%	1%	2%
<b>N/A - I do not have a preferred commercial airline.</b>	4%	2%	2%	7% c	4%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q4: Which of the following are reasons why this is your preferred airline? Please select all that apply.**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=449	N=71 *	N=141	N=126	N=93 *
<b>Total (Unweighted)</b>	N=441	N=64 *	N=128	N=131	N=103
<b>Flight cost</b>	57%	59%	50%	60%	62%
<b>Flight reliability (e.g., timeliness of arrivals/departures, flight cancelation frequency)</b>	47%	45%	45%	49%	53%
<b>Destinations (e.g., number of destinations, location of "hub" airports)</b>	46%	27%	42% b	50% B	63% BCd
<b>Customer service (e.g., gate agent, flight attendants)</b>	41%	38%	33%	44%	48% C
<b>Loyalty rewards</b>	39%	36%	35%	40%	51% bC
<b>Aircraft comfort (e.g., seat size, leg room)</b>	34%	44% d	34%	30%	36%
<b>Aircraft condition (e.g., age, cleanliness)</b>	29%	31%	29%	29%	33%
<b>In-flight amenities (e.g., food and drink, media)</b>	28%	31%	30%	31%	24%
<b>Airline guidelines (e.g., boarding process, luggage policy)</b>	26%	21%	31% e	29%	20%

continued...

QS1Q4: Which of the following are reasons why this is your preferred airline? Please select all that apply.

		Generation (Age)			
	Total- All qualified responde... A	Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Other, please specify</b>	2%	2%	2%	1%	2%
<b>Not at all sure</b>	2%	6% de	3%	1%	1%

**Table Base:** HAS FLOWN IN THE LAST 12 MONTHS AND HAS A PREFERRED AIRLINE

**QS1Q5: How satisfied or dissatisfied are you with each of the following aspects of your most recent flight?**

**Flight reliability (e.g., timeliness of arrivals/departures, flight cancelation frequency)**

		Generation (Age)			
	Total- All qualified responde... A	Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Satisfied (Net)</b>	89%	87%	87%	90%	92%
Very satisfied	53%	50%	47%	55%	59% C
Somewhat satisfied	36%	37%	40%	35%	33%
<b>Dissatisfied (Net)</b>	11%	13%	13%	10%	8%
Somewhat dissatisfied	7%	9%	9%	5%	4%
Very dissatisfied	4%	4%	4%	5%	3%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS



**QS1Q5: How satisfied or dissatisfied are you with each of the following aspects of your most recent flight?**

**In-flight amenities (e.g., food and drink, media)**

		Generation (Age)			
	Total- All qualified responde... A	Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Satisfied (Net)</b>	87%	89%	90%	87%	84%
Very satisfied	40%	42%	45% e	42%	31%
Somewhat satisfied	47%	47%	45%	46%	53%
<b>Dissatisfied (Net)</b>	13%	11%	10%	13%	16%
Somewhat dissatisfied	8%	4%	5%	10%	13% c
Very dissatisfied	4%	7%	5%	3%	3%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q5: How satisfied or dissatisfied are you with each of the following aspects of your most recent flight?**

**Aircraft condition (e.g., age, cleanliness)**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Satisfied (Net)</b>	94%	83%	92%	99% BCe	96% B
Very satisfied	54%	43%	48%	61% Bc	61% Bc
Somewhat satisfied	40%	41%	44%	38%	35%
<b>Dissatisfied (Net)</b>	6%	17% DE	8% D	1%	4% d
Somewhat dissatisfied	4%	10% De	6% D	1%	3%
Very dissatisfied	2%	6% D	3% d	0%	1%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q5: How satisfied or dissatisfied are you with each of the following aspects of your most recent flight?**

**Aircraft comfort (e.g., seat size, leg room)**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Satisfied (Net)</b>	85%	58%	90% B	93% B	86% B
Very satisfied	41%	32%	46%	43%	42%
Somewhat satisfied	44%	26%	44% B	50% B	44% B
<b>Dissatisfied (Net)</b>	15%	42% CDE	10%	7%	14%
Somewhat dissatisfied	9%	28% CDE	7%	3%	9% d
Very dissatisfied	5%	14% CDE	4%	4%	4%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q5: How satisfied or dissatisfied are you with each of the following aspects of your most recent flight?**

**Customer service (e.g., gate agent, flight attendants)**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Satisfied (Net)</b>	92%	83%	91%	96% B	95% B
Very satisfied	58%	51%	53%	64%	62%
Somewhat satisfied	34%	32%	37%	32%	32%
<b>Dissatisfied (Net)</b>	8%	17% DE	9%	4%	5%
Somewhat dissatisfied	5%	8% d	7%	2%	4%
Very dissatisfied	3%	8% DE	3%	2%	1%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q5: How satisfied or dissatisfied are you with each of the following aspects of your most recent flight?**

**Overall experience**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Satisfied (Net)</b>	91%	83%	91%	93% b	93% b
Very satisfied	54%	48%	54%	58%	54%
Somewhat satisfied	37%	35%	37%	35%	39%
<b>Dissatisfied (Net)</b>	9%	17% de	9%	7%	7%
Somewhat dissatisfied	6%	11% d	8%	4%	5%
Very dissatisfied	3%	6%	2%	4%	1%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q6: In general, do you think each of the following aspects of flying are improving or declining?**

**Flight reliability (e.g., timeliness of arrivals/departures, flight cancelation frequency)**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Improving</b>	41%	43% E	57% DE	40% E	24%
<b>No change</b>	35%	41% c	25%	35%	41% C
<b>Declining</b>	21%	10%	15%	24% bc	32% BC
<b>Not at all sure</b>	3%	5%	3%	1%	3%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q6: In general, do you think each of the following aspects of flying are improving or declining?**

**In-flight amenities (e.g., food and drink, media)**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Improving</b>	34%	54% DE	45% dE	32% E	12%
<b>No change</b>	38%	35%	40%	36%	42%
<b>Declining</b>	26%	10%	13%	32% BC	46% BCD
<b>Not at all sure</b>	1%	1%	3%	1%	0%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q6: In general, do you think each of the following aspects of flying are improving or declining?**

**Aircraft condition (e.g., age, cleanliness)**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Improving</b>	44%	51% E	61% DE	37% E	23%
<b>No change</b>	40%	33%	29%	44% C	56% BCd
<b>Declining</b>	13%	9%	7%	17% C	20% bC
<b>Not at all sure</b>	3%	7% E	4%	2%	1%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS



**QS1Q6: In general, do you think each of the following aspects of flying are improving or declining?**

**Aircraft comfort (e.g., seat size, leg room)**

		Generation (Age)			
	Total- All qualified responde... A	Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Improving</b>	36%	29% e	55% BDE	35% E	17%
<b>No change</b>	40%	49% c	33%	40%	45% c
<b>Declining</b>	22%	19%	10%	24% C	37% BCD
<b>Not at all sure</b>	2%	3%	2%	1%	1%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q6: In general, do you think each of the following aspects of flying are improving or declining?**

**Customer service (e.g., gate agent, flight attendants)**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Improving</b>	38%	52% DE	48% DE	32%	22%
<b>No change</b>	47%	28%	39%	53% BC	61% BC
<b>Declining</b>	11%	1%	10% B	15% B	16% B
<b>Not at all sure</b>	4%	19% CDE	3% d	0%	1%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q6: In general, do you think each of the following aspects of flying are improving or declining?**

**Overall experience**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Improving</b>	47%	64% DE	60% DE	42% E	26%
<b>No change</b>	35%	29%	25%	38% C	50% BC
<b>Declining</b>	15%	6%	11%	17% b	23% BC
<b>Not at all sure</b>	3%	1%	4%	2%	2%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q7: How much do you agree or disagree with each of the following statements?**

**I prefer flying over traveling by other methods of long-distance transportation (e.g., car, train).**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Agree (Net)</b>	76%	65%	81% B	82% Be	71%
Strongly agree	43%	37%	43%	45%	47%
Somewhat agree	33%	29%	38% E	37% E	24%
<b>Disagree (Net)</b>	24%	35% CD	19%	18%	29% d
Somewhat disagree	16%	22%	14%	15%	18%
Strongly disagree	7%	13% D	5%	3%	11% D
<b>Not at all sure</b>	0%	0%	0%	0%	0%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q7: How much do you agree or disagree with each of the following statements?**

**In general, requirements to reach airlines' loyalty tiers are too strict.**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Agree (Net)</b>	59%	67%	58%	58%	62%
Strongly agree	22%	17%	23%	27%	20%
Somewhat agree	37%	50% cD	35%	31%	42%
<b>Disagree (Net)</b>	26%	27%	28%	29%	20%
Somewhat disagree	21%	22%	22%	22%	17%
Strongly disagree	6%	5%	6%	7%	3%
<b>Not at all sure</b>	14%	6%	14%	13%	18% b

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q7: How much do you agree or disagree with each of the following statements?**

**I'm often frustrated by other travelers when I fly.**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Agree (Net)</b>	62%	63%	64%	66%	57%
Strongly agree	16%	23%	14%	18%	14%
Somewhat agree	46%	40%	50%	48%	43%
<b>Disagree (Net)</b>	38%	37%	36%	34%	43%
Somewhat disagree	26%	30%	22%	25%	31%
Strongly disagree	12%	6%	15%	9%	12%
<b>Not at all sure</b>	0%	0%	0%	0%	0%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS

**QS1Q7: How much do you agree or disagree with each of the following statements?**

**I'm concerned about the impact that flying has on the environment.**

	Total- All qualified responde... A	Generation (Age)			
		Adult Gen Z (18-26) B	Millennials (27-41) C	Gen X (42-57) D	Boomers (58-76) E
<b>Total</b>	N=467	N=72 *	N=143	N=137	N=98 *
<b>Total (Unweighted)</b>	N=457	N=65 *	N=131	N=138	N=108
<b>Agree (Net)</b>	53%	67% E	53% e	58% E	39%
Strongly agree	21%	30% E	28% E	19%	12%
Somewhat agree	32%	37%	26%	39% Ce	27%
<b>Disagree (Net)</b>	47%	33%	47%	42%	61% BcD
Somewhat disagree	28%	22%	27%	27%	33%
Strongly disagree	19%	11%	19%	15%	28% BD
<b>Not at all sure</b>	0%	0%	0%	0%	0%

**Table Base:** TRAVELED BY AIR IN THE LAST 12 MONTHS