

# 102023 - HOD FLASH (24 HOUR) SURVEY

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### 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:	,BC
Date Range:	(10/20/23 - 10/24/23)

### Segment Definitions

Total	(ALL)	n=1052
At least half business travel	(QS1Q2.r1 or QS1Q2.r2 or QS1Q2.r3)	n=121
Primarily personal travel	(QS1Q2.r4 or QS1Q2.r5)	n=347

### Weighting

Total	nweight.q102023_24_hourprop.val	q102023_24_hourprop
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**QS1Q1: Have you done each of the following in the last 12 months?**

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

	Total A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=1052	N=121	N=347
<b>Total (Unweighted)</b>	N=1052	N=119	N=338
<b>Yes</b>	44%	100%	100%
<b>No</b>	56%	0%	0%

**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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Only business travel</b>	2%	7% C	0%
<b>Mostly business travel with some personal travel</b>	6%	21% C	0%
<b>Both business travel and personal travel equally</b>	18%	71% C	0%
<b>Mostly personal travel with some business travel</b>	11%	0%	15% B
<b>Only personal travel</b>	63%	0%	85% B

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

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

	Total A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Delta Air Lines</b>	26%	29%	24%
<b>Southwest Airlines</b>	22%	14%	24% <b>B</b>
<b>American Airlines</b>	20%	26% <b>C</b>	18%
<b>United Airlines</b>	17%	21%	15%
<b>JetBlue Airways</b>	5%	5%	4%
<b>Spirit Airlines</b>	4%	2%	5%
<b>Frontier Airlines</b>	2%	1%	2%
<b>Other, please specify</b>	2%	0%	2%
<b>N/A - I do not have a preferred commercial airline.</b>	4%	1%	5%

**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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=449	N=119	N=330
<b>Total (Unweighted)</b>	N=441	N=118	N=323
<b>Flight cost</b>	57%	47%	60% B
<b>Flight reliability (e.g., timeliness of arrivals/departures, flight cancelation frequency)</b>	47%	50%	46%
<b>Destinations (e.g., number of destinations, location of "hub" airports)</b>	46%	53%	43%
<b>Customer service (e.g., gate agent, flight attendants)</b>	41%	43%	40%
<b>Loyalty rewards</b>	39%	40%	39%
<b>Aircraft comfort (e.g., seat size, leg room)</b>	34%	45% C	30%
<b>Aircraft condition (e.g., age, cleanliness)</b>	29%	37% C	26%
<b>In-flight amenities (e.g., food and drink, media)</b>	28%	34%	26%
<b>Airline guidelines (e.g., boarding process, luggage policy)</b>	26%	33% C	23%
<b>Other, please specify</b>	2%	4% C	1%
<b>Not at all sure</b>	2%	1%	3%

**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)**

	Total A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Satisfied (Net)</b>	89%	86%	91%
Very satisfied	53%	52%	54%
Somewhat satisfied	36%	34%	37%
<b>Dissatisfied (Net)</b>	11%	14%	9%
Somewhat dissatisfied	7%	9%	6%
Very dissatisfied	4%	5%	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?**

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

	Total A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Satisfied (Net)</b>	87%	89%	87%
Very satisfied	40%	49% C	37%
Somewhat satisfied	47%	40%	50%
<b>Dissatisfied (Net)</b>	13%	11%	13%
Somewhat dissatisfied	8%	6%	9%
Very dissatisfied	4%	5%	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?**

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

	Total A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Satisfied (Net)</b>	94%	91%	94%
Very satisfied	54%	60%	52%
Somewhat satisfied	40%	32%	42% b
<b>Dissatisfied (Net)</b>	6%	9%	6%
Somewhat dissatisfied	4%	6%	4%
Very dissatisfied	2%	3%	2%

**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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Satisfied (Net)</b>	85%	81%	87%
Very satisfied	41%	48%	39%
Somewhat satisfied	44%	34%	48% B
<b>Dissatisfied (Net)</b>	15%	19%	13%
Somewhat dissatisfied	9%	6%	10%
Very dissatisfied	5%	12% C	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?**

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

	Total A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Satisfied (Net)</b>	92%	88%	94% <b>b</b>
Very satisfied	58%	62%	57%
Somewhat satisfied	34%	26%	37% <b>b</b>
<b>Dissatisfied (Net)</b>	8%	12% <b>c</b>	6%
Somewhat dissatisfied	5%	8%	4%
Very dissatisfied	3%	5%	2%

**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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Satisfied (Net)</b>	91%	84%	94% B
Very satisfied	54%	59%	53%
Somewhat satisfied	37%	25%	41% B
<b>Dissatisfied (Net)</b>	9%	16% C	6%
Somewhat dissatisfied	6%	11% C	5%
Very dissatisfied	3%	6% c	2%

**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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Improving</b>	41%	63% C	34%
<b>No change</b>	35%	25%	38% B
<b>Declining</b>	21%	12%	24% B
<b>Not at all sure</b>	3%	0%	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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Improving</b>	34%	51% C	28%
<b>No change</b>	38%	38%	38%
<b>Declining</b>	26%	10%	32% B
<b>Not at all sure</b>	1%	1%	2%

**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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Improving</b>	44%	55% C	40%
<b>No change</b>	40%	28%	44% B
<b>Declining</b>	13%	12%	13%
<b>Not at all sure</b>	3%	5%	2%

**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)**

	Total A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Improving</b>	36%	47% C	33%
<b>No change</b>	40%	36%	41%
<b>Declining</b>	22%	15%	25% b
<b>Not at all sure</b>	2%	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?**

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

	Total A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Improving</b>	38%	49% C	34%
<b>No change</b>	47%	40%	49%
<b>Declining</b>	11%	7%	12%
<b>Not at all sure</b>	4%	4%	4%

**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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Improving</b>	47%	61% C	42%
<b>No change</b>	35%	28%	38%
<b>Declining</b>	15%	7%	18% B
<b>Not at all sure</b>	3%	3%	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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Agree (Net)</b>	76%	75%	77%
Strongly agree	43%	45%	43%
Somewhat agree	33%	29%	35%
<b>Disagree (Net)</b>	24%	25%	23%
Somewhat disagree	16%	18%	16%
Strongly disagree	7%	8%	7%
<b>Not at all sure</b>	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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Agree (Net)</b>	59%	64%	58%
Strongly agree	22%	31% C	19%
Somewhat agree	37%	33%	38%
<b>Disagree (Net)</b>	26%	29%	25%
Somewhat disagree	21%	21%	20%
Strongly disagree	6%	7%	5%
<b>Not at all sure</b>	14%	7%	17% 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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Agree (Net)</b>	62%	68%	60%
Strongly agree	16%	22% c	14%
Somewhat agree	46%	46%	46%
<b>Disagree (Net)</b>	38%	32%	40%
Somewhat disagree	26%	19%	29% b
Strongly disagree	12%	14%	11%
<b>Not at all sure</b>	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 A	At least half business travel B	Primarily personal travel C
<b>Total</b>	N=467	N=121	N=347
<b>Total (Unweighted)</b>	N=457	N=119	N=338
<b>Agree (Net)</b>	53%	59%	51%
Strongly agree	21%	28% C	19%
Somewhat agree	32%	32%	32%
<b>Disagree (Net)</b>	47%	41%	49%
Somewhat disagree	28%	23%	30%
Strongly disagree	19%	18%	20%
<b>Not at all sure</b>	0%	0%	0%

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