

Travel & Hospitality: An Industry Snapshot

How and when we choose to travel is tied to our personal preferences, availability, and our pocketbooks. This month, we are taking a look at several trends in the travel space using data from recent Harris Poll surveys and QuestBrand data. The report is intended to give you a peek into the world of travel as of June 2024.

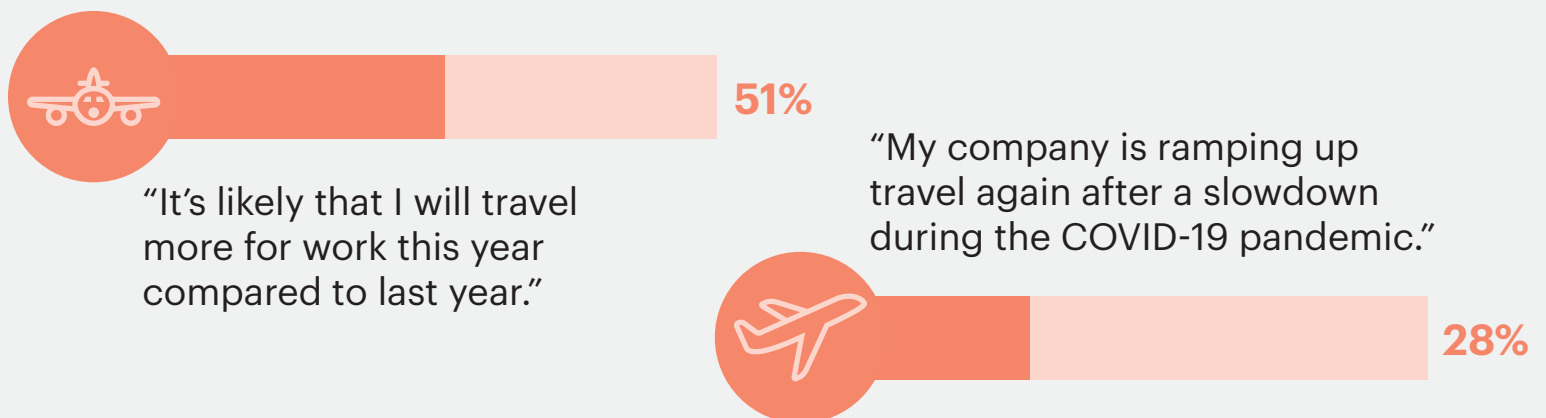
The snapshot dives into the world of business travel and airport security. We close with our monthly over-index report, listing 20 non-travel brands that over-index with business travelers. Our goal is to provide brands with the data and information needed to understand how American consumers think and act.

Business Travel Is On The Rise - COVID Did Not Make Work Travel Obsolete

In April, the [Wall Street Journal reported](#) that business travel had almost returned to pre-pandemic levels. With workers on the road again, we asked US adults about their experiences with work travel.

Respondents have observed the WSJ's reported travel surge in their own lives. A third (**28%**) of **Americans who travel for work say their company is ramping up travel again after a slowdown during the COVID-19 pandemic**. Half (**51%**) say that **it's likely that they will travel more for work this year compared to last year**. But there is still room for an even greater surge in business travel - 18% say that they still travel for work less now than before the pandemic.

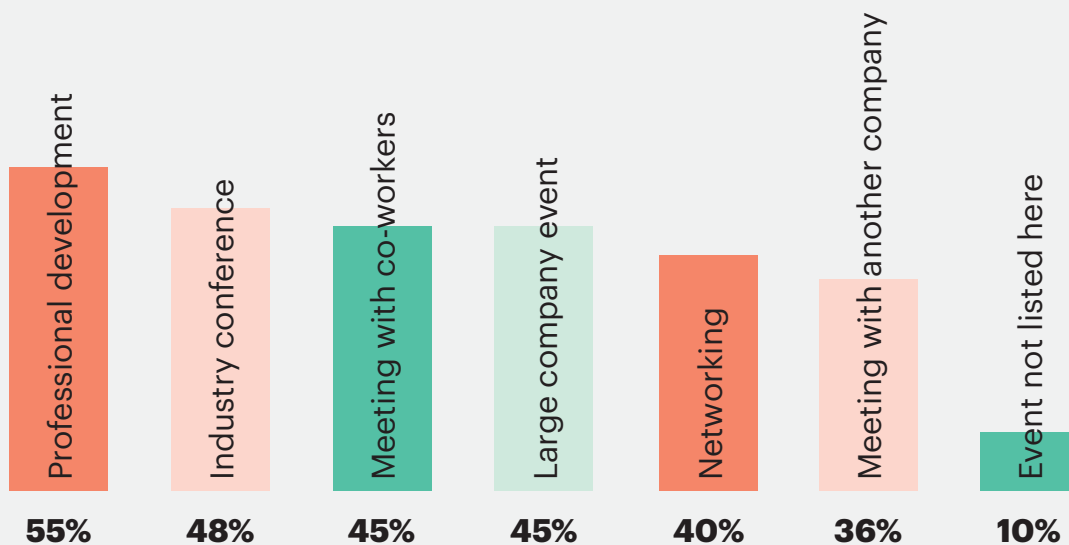
While work travel is on the rise, only a fraction of employees actually travel for work - **10% of US adults say that their current job requires work travel**. Of those who travel for work, **24% travel at least once a week, 24% travel at least once a month, and 43% travel at least once every three months**. The majority of work trips are nearby – more than half (56%) of work trips remain within the same state where the employee works. In contrast, a quarter (24%) of work travel is international.



Often, the lines blur between business and personal travel. A third (**31%**) of those who travel for work say that **they try to extend the length of their work trips into personal vacations when they can** - a trend informally known as “bleisure travel.” Even if they can’t sneak in a few extra days, **58% of business travelers say they try to explore as much of the destination as time allows when traveling for work.**

There is also a crossover between personal and business bookings - 59% of US adults who travel for work say that they **usually book with the same brands for personal and business travel accommodations.** This is possible since **half (49%) of business travelers usually book their own work travel plans and accommodations** (e.g., rental car, hotel, flight).

Which of the following events will you **travel to for work this year?**



Base: US adults who travel for work, n=106. S4Q6: Which of the following events will you travel to for work this year? Please select all that apply.

During the pandemic, many Americans moved away from the country’s largest cities. This diaspora ramped up the need for employee-travel in order to meet with co-workers in-person. In fact, meeting with one’s own company drove a significant portion of business travelers’ reported upcoming trips this year, including traveling for **professional development** (e.g., training, education) (**55%**), **meeting with members of the respondent’s own company** (**45%**), and traveling to **large events hosted by the respondent’s company** (**45%**).

Companies’ renewed emphasis on business travel is good for the airlines, hotels, and restaurants. A quarter (**24%**) of **US adults who travel for business say that they spend more money on work trips than they do for personal trips.** Could we have hit a work-travel plateau, or do you predict that business travel will continue to rise over the next year?

Passengers Trust That The TSA Will Keep Them Safe - But Are Newer Screening Technologies Too Invasive?

You know the drill – remove your shoes, your belt, take everything out of your pockets. Anyone who flies commercially in the United States has passed through a Transportation Safety Administration (TSA) checkpoint.

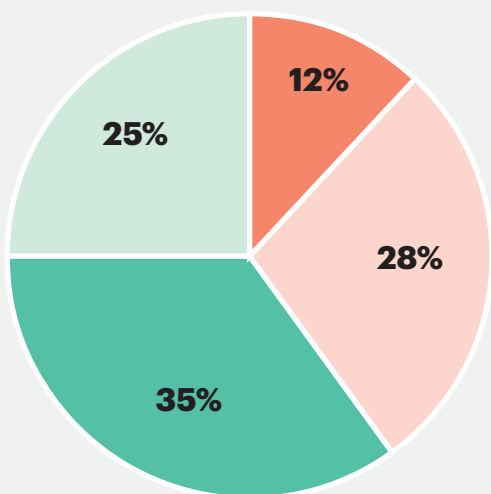
Despite the minor irritation of being scanned and searched, sentiment towards the TSA is generally positive. Americans largely trust that the TSA will keep travelers safe. Eight-in-10 US adults who fly commercially (**78%**) agree that they feel safer flying knowing that the TSA is monitoring passengers, and **66%** agree that the TSA and other airport security measures make them feel like there will be no dangerous items brought onto the flight.

In general, **commercial fliers (67%)** think that it takes an appropriate amount of time to get through airport security. Perhaps surprisingly, **73% of fliers agree that they would be willing to spend more time in airport security if it meant that the chances of dangerous items being brought onto flights decreased.**

While Americans appear largely satisfied with TSA's current security measures, the agency continues to evolve their practices as technology improves. Travelers are less supportive of several newer safety developments, including **self-service screening lanes (52%)** or **the use of AI facial recognition (51%) at airport security checkpoints.** Several US Senators are even pushing for **restrictions to be placed** on the TSA's use of facial recognition.

Like the politicians, passengers' hesitancy towards these newer screening measures may stem from privacy concerns. Currently, **less than half (40%) of commercial fliers agree that they feel like their privacy is being invaded when they go through airport security.** We could see this percentage rise if TSA continues to implement more invasive, yet more effective, scanning methods in the years ahead.

Three-quarters (**68%**) of fliers already think that airport security screenings are appropriately thorough. Should TSA continue to introduce new security measures, or is it more important to protect passengers' privacy?



"I feel like my **privacy is being invaded** when I go through **airport security.**"



- Strongly Agree
- Somewhat Agree
- Somewhat Disagree
- Strongly Disagree

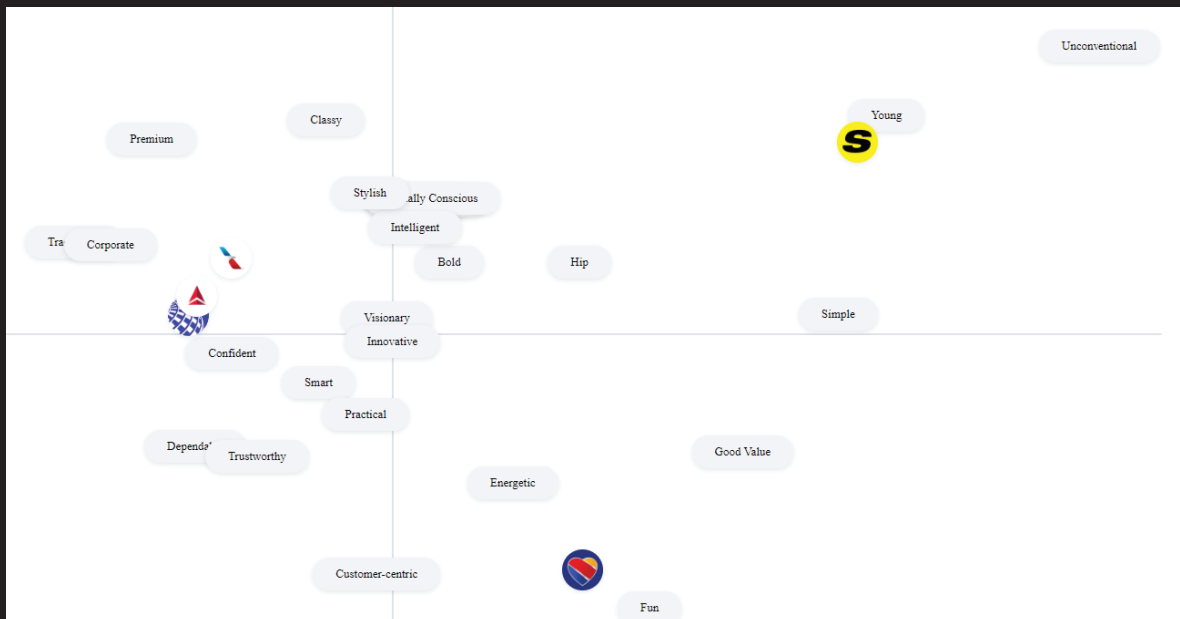
Base: US adults who fly using commercial airlines. Total, n=812. Q53Q2x: How much do you agree or disagree with each of the following statements? I feel like my privacy is being invaded when I go through airport security.

What Do US Travelers Think About These Five Leading Airline Carriers?

Each airline has its own personality, accompanied by its own set of advantages and challenges. Using data from [QuestBrand by The Harris Poll](#) we explored how Americans describe five of the leading airlines. Responses are taken from US adults who have flown for personal or business travel.

Based on each logo's position on the perceptual map below, we can see what descriptors each airline brand owns. This is valuable information for the companies as they carve out their niche in the market and look to understand how consumers perceive their brand versus their competitors' brands.

Airlines Perceptual Map - US Adults Who Have Flown For Personal or Business Travel



QuestBrand. Base: US adults who have flown for either personal or business travel, n=13,869. 7/1/23-5/31/24.

Delta, United, and American Airlines are the three largest airlines in the US. As such, they often compete for the same fliers. Since they share a similar space in consumers' minds, they are positioned near one another on the perceptual map. **US fliers consider all three "Confident" and "Corporate."**

However, when just the big three are compared against one another on a separate perceptual map, Delta, the **number 1 ranked airline** based on customer satisfaction (first class, business class, and premium economy), is positioned closer to **"Premium" and "Fun"** than its two rivals. In this new arrangement, **American Airlines owns "Simple" and United owns "Practical."**

Southwest and Spirit airlines' business models differ from the big three. **Spirit is a budget airline, known for its low-cost fares and no-frills travel proposition.** This approach has earned Spirit the distinction of being described as **"Young" and "Unconventional"** more often than the other airlines.

Southwest Airlines is similarly known for offering lower fares than the big three. Beyond price, Southwest is celebrated for providing strong customer service, and for its quirky brand personality. These traits contribute to its **reputation as "Fun," "Customer-centric," and "Energetic."** Southwest holds the honor of being the number 1 ranked airline based on customer satisfaction among basic economy fliers. How would you describe each airline's unique value proposition?

Over-Index Report: Business Travelers' Preferred Brands

This month's over-index report provides a unique look into business travelers' preferred brands. Using brand equity data from QuestBrand, we ranked 20 (non-travel) brands that over-index with business travelers. This indicates that business travelers value

these brands more highly than the general population of US adults. To determine this ranking, we compared each brand's brand equity score among the general population of US adults to its brand equity score among US adults who flew for business.

20 Brands that Over-Index with Business Travelers

Brand equity data was taken from October 2023 - March 2024.

1.	 vineyard vines®	11.	kate spade NEW YORK
2.		12.	
3.		13.	
4.	CANADA GOOSE	14.	WARBY PARKER
5.		15.	
6.	MERRELL	16.	BURBERRY
7.	JOS. A. BANK	17.	patagonia®
8.		18.	NINE WEST
9.	ANTHROPOLOGIE	19.	Tommy Bahama®
10.		20.	FOSSIL GROUP

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