



2012 IATA GLOBAL PASSENGER SURVEY HIGHLIGHTS

We know because we asked.

* The information contained in our databases and used in this presentation has been assembled from many sources, and whilst reasonable care has been taken to ensure accuracy, the information is supplied on the understanding that no legal liability whatsoever shall attach to the International Air Transport Association (IATA), its offices, or employees in respect of any error or omission that may have occurred.



2012 IATA GLOBAL PASSENGER SURVEY

- IATA inaugurated this survey in 2012 and utilized social media to reach target audience
- Nearly 3,000 respondents from over 110 countries who travelled in the 12 months prior participated in survey which was conducted in June 2012
- Respondents were 17% North America, 36% Europe, 17% Asia Pacific, 21% South America, 9% Middle East and Africa
- Results reflects wider preferences regionally and globally, not just individual respondents

Supported by  NCR

THERE'S
STILL
SOMETHING
MAGIC
ABOUT
FLYING

Under-25s say they
“enjoy the experience
on board the aircraft”
as much as “arriving
at my destination”.

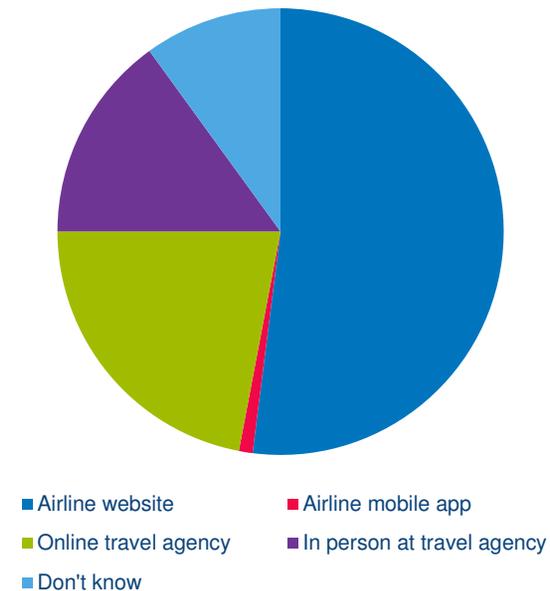
★ The older age groups
just want to arrive.

We know because we asked.

BOOKING VIA ONLINE TRAVEL AGENTS STILL LESS THAN 50% OF AIRLINE WEBSITES

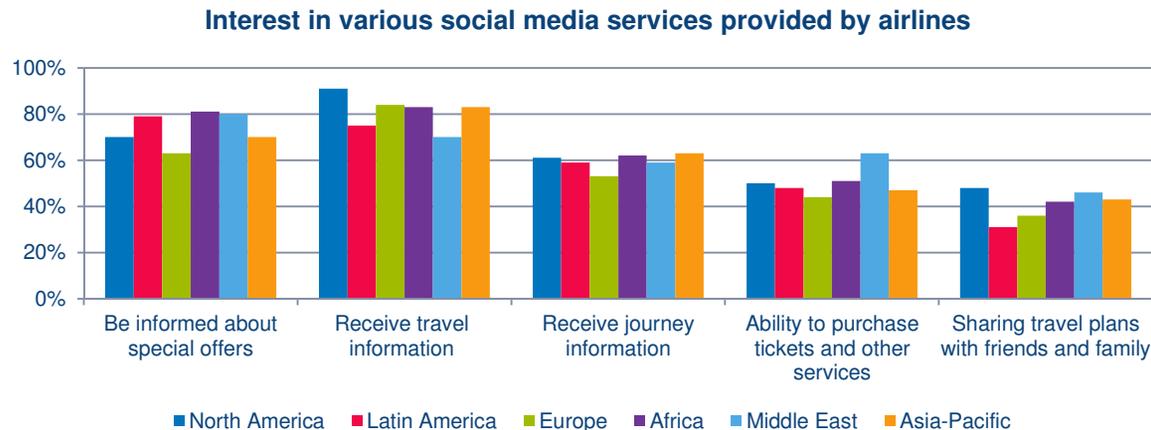
- 52% booked most of their flights themselves via an airline website; while 22% used an online travel agency
- In terms of travel class, 24% traveled in business when traveling long-haul (flights of 5 hours or more) compared to 82% in economy when traveling short-haul (flights of less than 5 hours)

Breakdown of channels used to book flights



HIGH PREFERENCE FOR MORE SOCIAL INTERACTION AND TIMELY TRAVEL INFO

- 59% use social media on a daily basis
- 60% want to interact with their airline using social media during their journey
- 84% interested in receiving travel information; while only 42% interested in sharing travel plans with family and friends

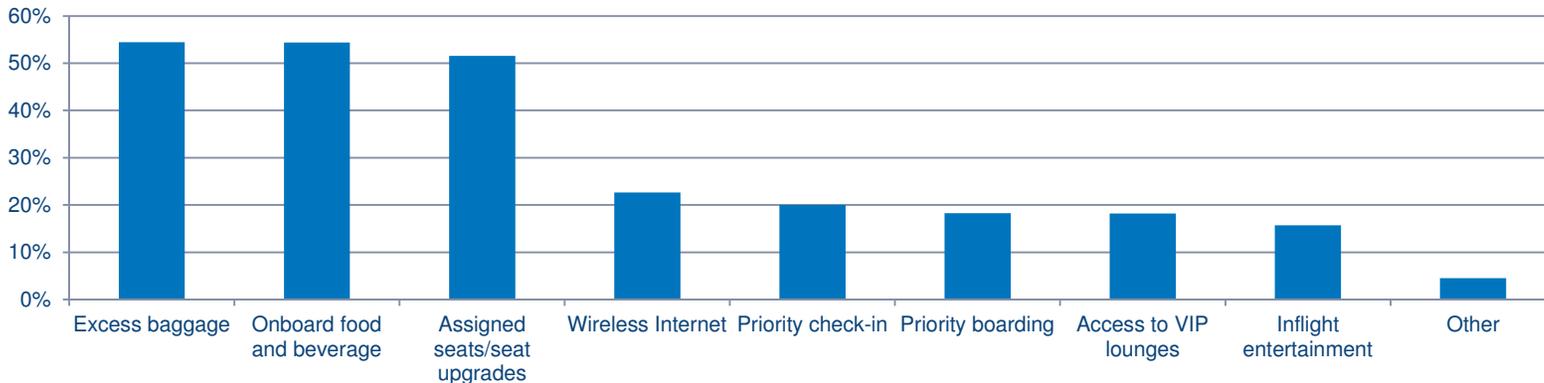




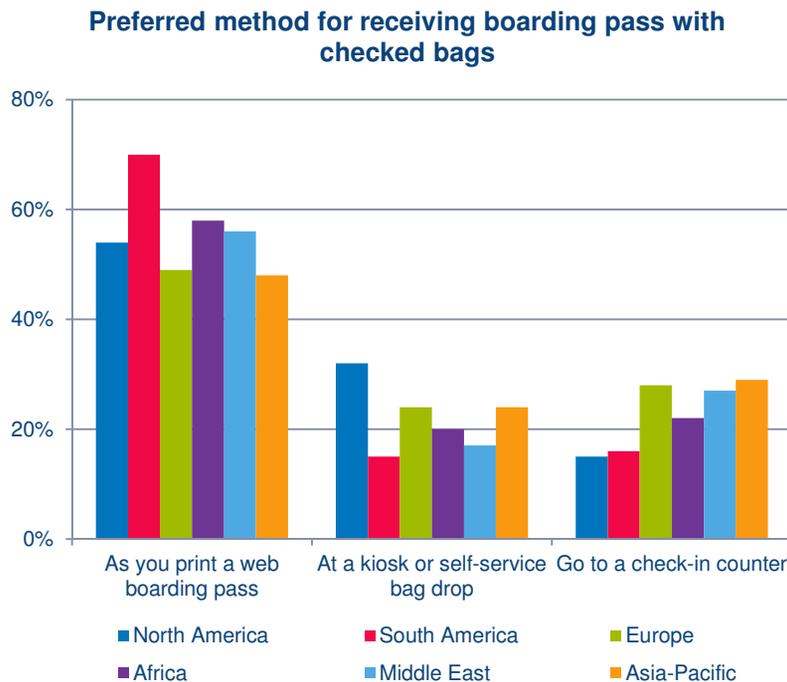
MINORITY BOUGHT ANCILLARY SERVICES: BAGS, FOOD & SEATS MOST FREQUENTLY PURCHASED

- 34% bought additional services for flights in preceding 12 months
- Of those purchasing ancillary services, most paid for checking baggage and/or excess baggage, followed by onboard food and beverage, then assigned seats and/or seat upgrades

Types of additional services travelers bought in preceding 12 months



INTERNET & AUTOMATED CHECK-IN PREFERRED EQUALLY AS BIOMETRIC BOARDING PASSES



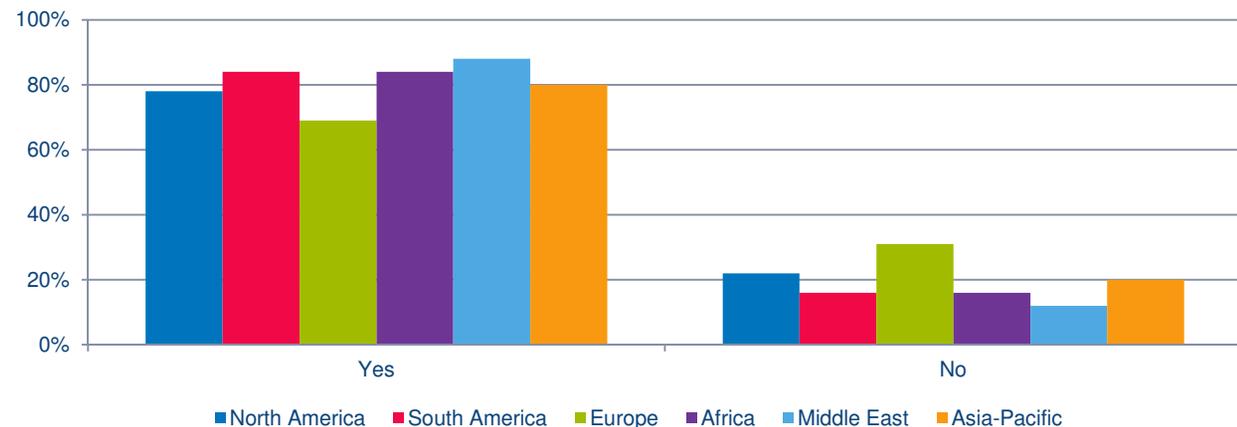
- Internet and Automated check-in equally preferred when traveling with hand baggage only: 37% and 36% respectively
- 37% prefer not to have a boarding pass and would use some form of biometrics as boarding token when traveling with hand baggage only
- Travelers prefer to print web bag-tags when printing a web boarding pass; highest preference came from South America

SELF-SERVICE TRUMPS HUMAN INTERVENTION: MAJORITY PREFER SELF-BOARDING & BIOMETRICS

- 71% prefer to use self-boarding gate device and self-scan their mobile phone when boarding
- 77% comfortable to use biometrics if available; lowest comfort level in Europe

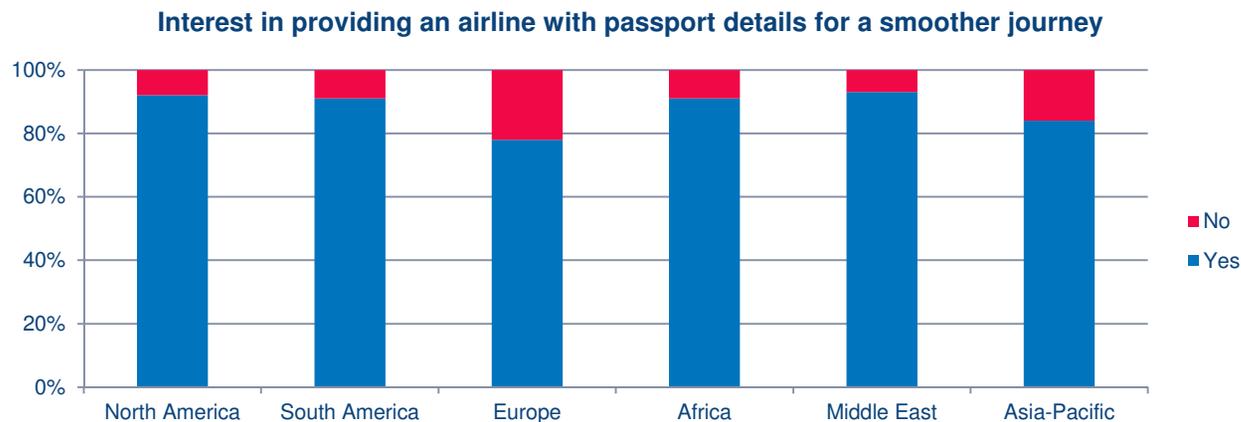


Would you be comfortable using biometrics if available for boarding



TRAVELERS DON'T MIND PROVIDING PASSPORT DETAILS FOR A FACILITATED JOURNEY

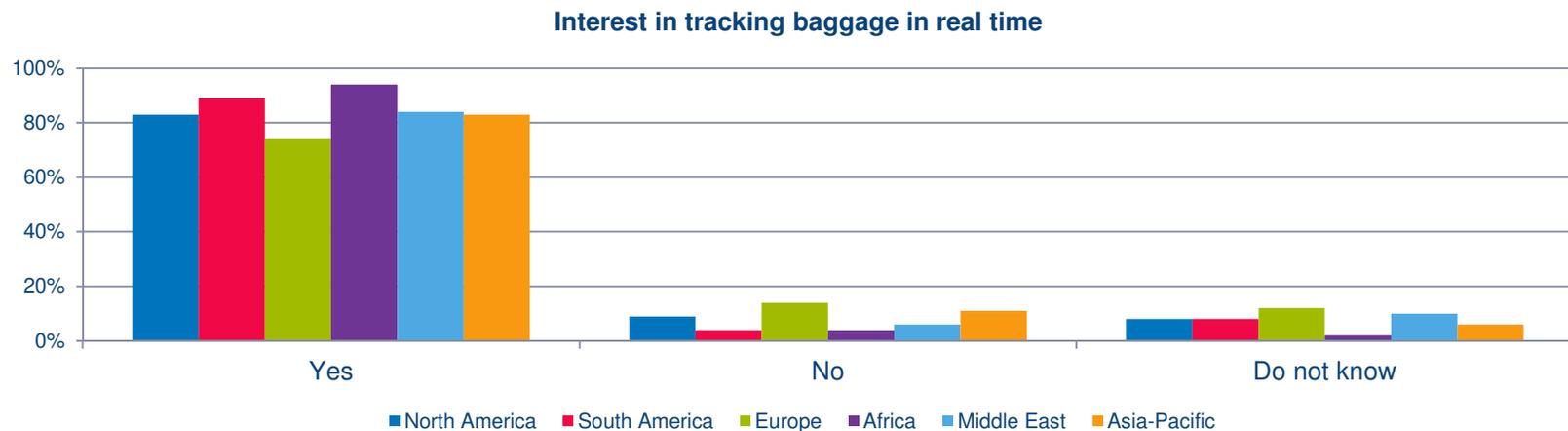
- 86% interested in providing an airline with their passport details in advance to allow a smoother journey
- 91% interested in automated immigration border gates for a faster arrival processing
- For travel information such as permits, visas or vaccinations, most travelers search online, only 35% checked with relevant embassy/consulate





TRAVELERS SATISFIED WITH CHECKED BAG EXPERIENCE; HIGH INTEREST IN BAG TRACKING

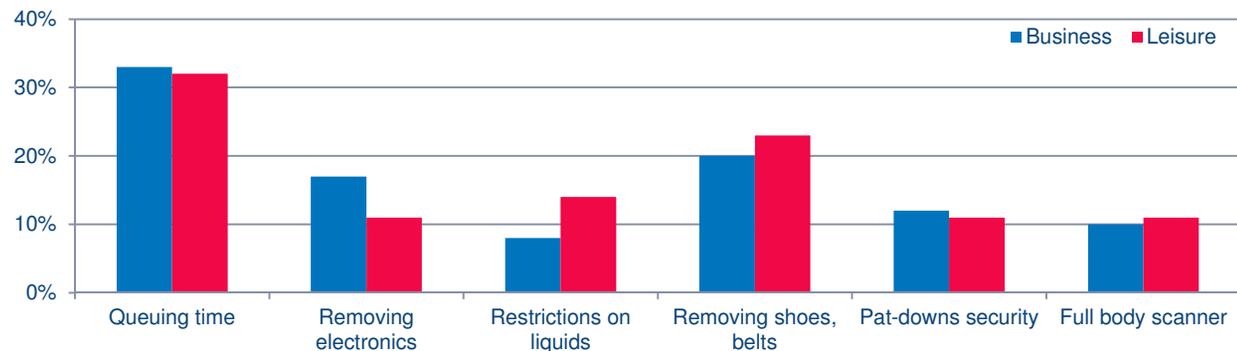
- 67% satisfied with their checked baggage experience for most recent flight
- 81% interested in tracking bags in real time
- Most preferred option for registering a claim for mishandled or misplaced baggage is to see a reclaim agent at airport



REASONABLE QUEUING TIME ACCEPTABLE, REMOVAL OF PERSONAL EFFECTS ISN'T

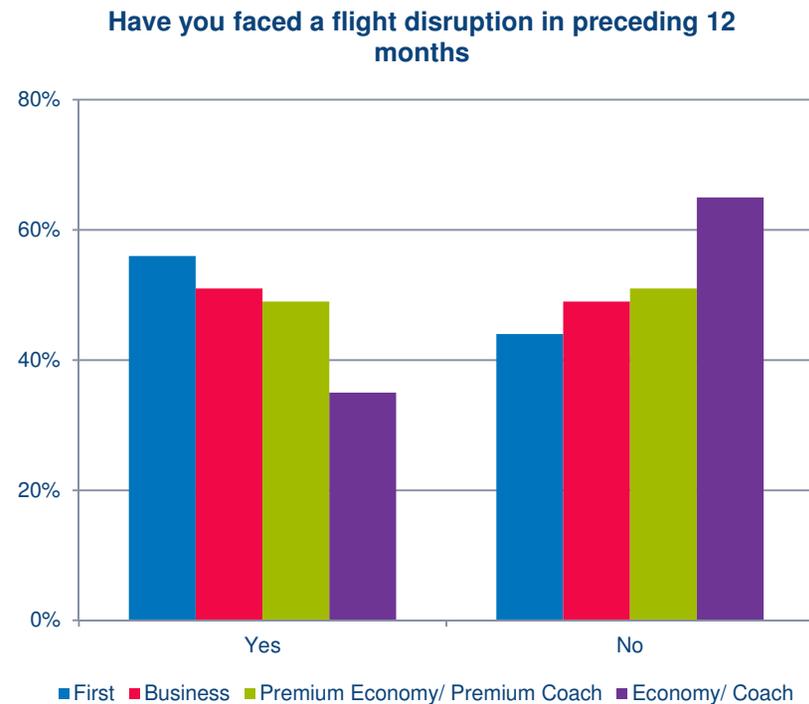
- 51% consider 5-10 minutes an acceptable queuing time at security screening
- Most frustrating of security screening is queuing time; followed by removing shoes, belts and other personal effects
- 73% are willing to share personal background information with governments in order to speed up security screening

Most frustrating elements of the security screening process



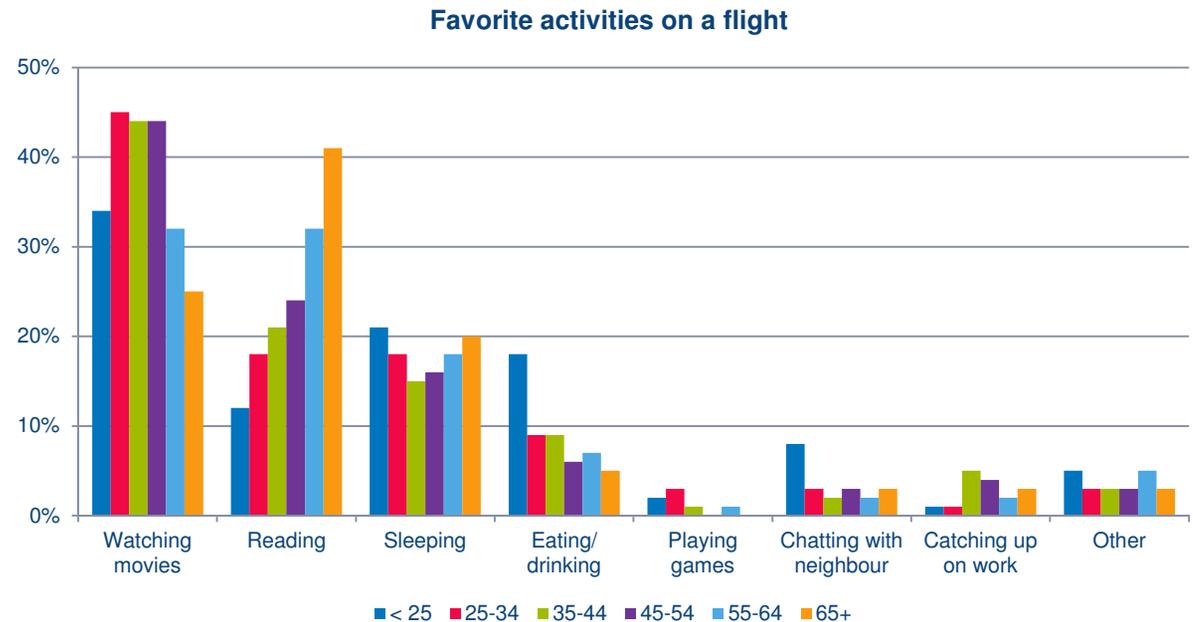
PROACTIVE NOTIFICATIONS IN EVENT OF FLIGHT DISRUPTIONS ARE UNANIMOUSLY PREFERRED

- 40% faced a travel disruption in preceding 12 months
- Almost all travelers want proactive notifications, preferably by text message (66%)



ALTHOUGH THERE ARE MORE ACTIVITIES ONBOARD TODAY, TOP THREE FAVORITE ACTIVITIES ON A FLIGHT ARE:

- Watching movies (41%)
- Reading (21%)
- Sleeping (17%)



NO-ONE CAN STAY YOUNG FOREVER



We know because we asked.



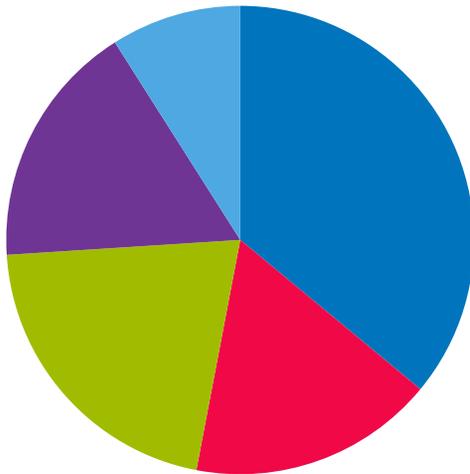
Out of all the choices for favorite things to do during a flight, **'playing games'** was the least popular.

Even less popular than **'catching up on work'**!



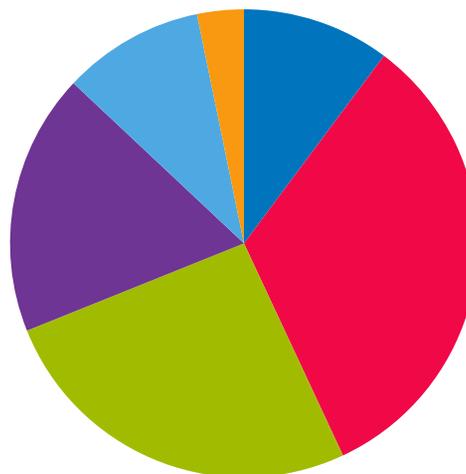
DIVERSE LOCATIONS AND AGES OF RESPONDENTS PRESENT A TRULY GLOBAL PERSPECTIVE

Regional breakdown of respondents



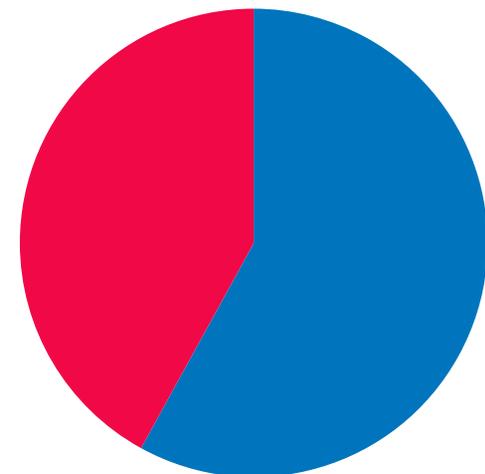
■ Europe
■ North America
■ South America
■ Asia Pacific
■ Middle East and Africa

Age breakdown of respondents



■ 25 and younger
■ 25-34
■ 35-44
■ 45-54
■ 55-64
■ 65 and older

Gender breakdown of respondents



■ Male
■ Female



IATA GLOBAL PASSENGER SURVEY: SUMMARY

- The 2012 IATA Global Passenger Survey highlights self-service, social and information
- Majority of travelers want greater interaction with their airlines for timely and accurate information
- Travelers don't mind providing personal information in advance if it means a smoother travel experience subsequently
- Diverse respondent profile reveals interesting variations by region, age and gender

For more info on the IATA Global Passenger Survey, please contact us at paxsurvey@iata.org

Supported by  NCR