2014 IATA
GLOBAL PASSENGER SURVEY

Supported by:

* 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) and pwc, their offices, or employees in respect of any error or omission that may have occurred.
2014 IATA GLOBAL PASSENGER SURVEY

- Independent survey conducted in July-September 2014
- Third time survey has been conducted
- Targeted respondents through social media, email and word-of-mouth
- Nearly 5,500 respondents from over 140 countries participated in survey
- Results reflect regional and global preferences in travel
Why can’t airlines use social media to contact me?

CLARO, uso internet quando viajo de avião!

Хммм, мне нужно больше времени в аэропорту для покупок

담연히 비행하는 동안 인터넷이 필요합니다!

我想我会喜欢使用手机电子登机牌。

أريد أن أعرف أين توجد متعتني طوال الوقت

What’s YOUR opinion?

Qual é a SUA opinião?

Какова Ваша точка зрения?

参連的 想象是 哪裏呢?

我的意見如何?

BIEN SÛR, j’ai besoin d’Internet lorsque je prends l’avion!

I’ve always wondered why I can’t tag my bags myself

Me gusta hablar con los que se sientan a mi lado durante el vuelo.

Ooh, I don’t mind all that waiting at airport security

Was ist IHRE Meinung?

¿Qué PIENSAS?

What’s YOUR opinion?

What’s YOUR opinion?

www.iata.org/paxsurvey

www.iata.org/paxsurvey

www.iata.org/paxsurvey

www.iata.org/paxsurvey

www.iata.org/paxsurvey

www.iata.org/paxsurvey

www.iata.org/paxsurvey

www.iata.org/paxsurvey

www.iata.org/paxsurvey

www.iata.org/paxsurvey

www.iata.org/paxsurvey
TRAVEL SHOPPING
AIRLINE WEBSITES REMAIN PRE-DOMINANT BOOKING CHANNEL

- More than 50% booked flights directly from an airline (website or mobile app)
- Airline websites and mobile app bookings have been growing steadily year on year
- 25% used travel agencies (online and offline)
LEISURE SEGMENT MOSTLY SPENDS UP TO $3K ANNUALLY ON TRAVEL; BUSINESS UP TO $12K

Amount spent over 12 months on leisure travel:
- Less than $500: 17%
- $501-$1,000: 15%
- $1,001-$2,000: 22%
- $2,001-$3,000: 6%
- $3,001-$6,000: 15%
- $6,001-$10,000: 17%
- More than $10,000: 4%

Amount spent over 12 months on business travel:
- Less than $1,000: 12%
- $1,000-$3,000: 16%
- $3,001-$6,000: 17%
- $6,001-$12,000: 21%
- $12,001-$24,000: 24%
- $24,001-$48,000: 6%
- More than $48,000: 4%
THREE IS THE MAGIC NUMBER

A quarter of travelers visit at least 3 websites before purchasing their ticket.

www.iata.org/paxsurvey
WEBSITE COMPARISON INCREASING WHEN BOOKING TRAVEL

- Most travelers (85%) compared multiple travel websites before purchasing tickets
- ¾ compared websites before committing to purchase (2013)
- Close to a third of travelers found it difficult to compare offers from various airline websites
I'M JUST LOOKING

1 in 4 do not proceed to payment when booking tickets online. Half of these are just looking for price.

WE KNOW BECAUSE WE ASKED

www.iata.org/paxsurvey
NORTH AMERICA LEADS IN OPTIONAL SERVICES; SEATS AND UPGRADES MOST PURCHASED

更多的北美旅行者在过去12个月内购买了可选服务。

- 大于50%的北美旅行者在过去12个月内购买了可选服务。

- 那些购买的人中，保留座位和升舱（57%），现在购买的比行李和额外行李（45%）更多。

### Types of optional services North American travelers bought in the past 12 months

- Excess baggage
- Seats or upgrades
- Onboard F&B
- Travel insurance
- Hotel booking
- Car rental
- Priority check-in
- Priority boarding
- Duty free shopping
- Lounge access
- Wireless internet
- IFE

2014

2013
TRAVEL EXPERIENCE
AUTOMATIC CHECK-IN GROWING IN PREFERENCE; KIOSKS LEAST PREFERRED

- 38% prefer automatic check-in i.e. receive their boarding pass from airline directly by text message or e-mail
- Preference of self-service check-in (Internet/ mobile) has dropped significantly but remains popular
- Airports kiosks are least preferred
ELECTRONIC BAG TAGS AND REAL-TIME BAG TRACKING HIGH ON TRAVELERS’ WISHLIST

- 75% would use self-tag bags with a printed or electronic bag tag
- 80% interested in tracking bags throughout journey

Preferred option for preparing bags before flight:

- Print a bag tag at home/office and attach it myself: 25%
- Use an electronic bag tag: 14%
- Print and attach a bag tag at an airport kiosk or counter: 17%
- Ask airline agent to tag my bag: 44%
CAN I PAY WITH HASHTAGS?

1 in 10 purchased their travel through social media. Asia Pacific trumps the rest of the world in its use of social media with a ratio of 1 in 5.

WEKNOW BECAUSE WEASKED

www.iata.org/paxsurvey
BAG FEES LESS FRUSTRATING; DAMAGE AND QUEUES REMAIN POINTS OF CONTENTION

- Extra fees for bags are becoming less of a reason of dissatisfaction for travelers (20% to 12%)
- Bags delayed on arrival significant reason for dissatisfaction reflected by 25% of travelers
- Satisfaction level for handling of bags remains consistently high at 90%

*Additional option introduced in 2014
TRAVELERS ARE MORE IMPATIENT; 10-MINUTE QUEUING THRESHOLD

- 50% consider a queue time of between 5 and 10 minutes acceptable
- 1 in 5 travellers are still not sufficiently informed about security screening procedures by the relevant entities
WAITING IN LINE IS FUN!!!

1% wouldn’t mind queuing more than 20 minutes in an airport security line. What is your threshold for queuing?

WENOW BECAUSE WEASKED

www.iata.org/paxsurvey
PROACTIVE NOTIFICATIONS IN EVENT OF FLIGHT DISRUPTIONS ARE UNANIMOUSLY PREFERRED

- 75% of travelers want to be informed in the event of a flight disruption

- Less than 1 in 10 travelers would consult the airline or airport website
  - 16% would turn to a smartphone app

Preference for receiving notifications of changes to flights/travel:

- Consult airport website: 4%
- Consult airline website: 1%
- Receive text/email: 16%
- Information on smartphone app: 75%
- Other: 4%
TRAVEL TECHNOLOGY
ONE-THIRD OF TRAVELLERS WOULD USE WI-FI AT AIRPORTS FOR EMAILS

- Highest preference shown to use Wi-Fi at airport for emails
- Preference demonstrated for essential travel related activities
- Use of Wi-Fi for social media dropped from 18% (2013) to 13% (2014)

Use of wireless connectivity at airports:
- 29% for receiving airline-related info
- 23% for browsing the Internet
- 32% for sending/receiving emails
- 13% for streaming videos
- 1% for using social media
Watching Movies & TV - The Traveler’s Favorite Inflight Activity

Close to 40% of travelers like watching movies and TV, more than double second favorite activity of sleeping.

Favorite activity during a flight

- Watching movies/TV
- Sleeping
- Reading
- Looking out the window
- Eating/drinking
- Browsing the internet
- Working
- Chatting to others
- Playing games
- Other
YAY, FLUFFY CLOUDS!!!

1 in 8 travelers love staring out of the window. And men are twice more likely to look out of an aircraft than women.

WE KNOW BECAUSE WE ASKED

www.iata.org/paxsurvey
TRAVELERS NOT LIKELY TO PAY FOR MOST IFE SERVICES; SENTIMENT CONSISTENT GLOBALLY

- High percentage of travelers not likely to purchase IFE services if charged
- Most likely service to be purchased would be internet access

![Likelihood to purchase IFE service graph]
I DON’T SHARE MY LOLLIPOP!

More people tend to keep their travel plans to themselves. They’d rather share their photos afterwards.

WEKNOW BECAUSE WEASKED

www.iata.org/paxsurvey
GLOBAL PERSPECTIVE FROM A DIVERSE SPECTRUM OF RESPONDENTS

Regional breakdown of respondents
- North America: 35%
- Latin America: 7%
- Europe: 27%
- Asia Pacific: 24%
- Africa: 3%
- Middle East: 4%

Age breakdown of respondents
- 25 and younger: 19%
- 25-34: 23%
- 35-44: 12%
- 45-54: 5%
- 55-64: 11%
- 65 and older: 29%

Gender breakdown of respondents
- Male: 68%
- Female: 32%
Most business travellers that took the survey completed 1 to 4 trips in the past 12 months

# of flights taken (Business)
- 23% None
- 31% Between 1 and 4
- 17% Between 5 and 10
- 29% More than 10

# of flights taken (Leisure)
- 12% None
- 8% Between 1 and 4
- 24% Between 5 and 10
- 55% More than 10

Annual household Income
- 10% Less than $25,000
- 14% $25,000-$50,000
- 9% $50,001-$100,000
- 17% $100,001-$150,000
- 26% $150,001-$200,000
- 24% More than $200,000
2014 IATA GLOBAL PASSENGER SURVEY

- 2014 IATA Global Passenger Survey highlights choice, service, speed and connectivity
- Travelers want technology to improve their travel experience and receive timely and accurate information
- Travelers prefer to compare and will only pay for services deemed valuable and pertinent to their travel experience

For more information on the IATA Global Passenger Survey or for specific survey report requests, please contact us at paxsurvey@iata.org