

Airservices Travel Sentiment Index 2023

From locked down to sky high



Foreword

The return of international and domestic air travel is a significant feature of a world emerging from the pandemic. But what of the future? Our direction as an industry is driven by one critical group of stakeholders — the air travel consumer.

This report draws on an Ipsos-conducted survey of a nationally representative sample of 1,000 Australian adults aged 18-64. They were asked about their recent air travel experiences, their beliefs and concerns about the future, and the place air freight and travel holds in the broader economy.

It is clear from their responses that, in 2022, the ability to travel by plane is regarded as a critical feature of life. This is particularly true for Australians aged 39 and under, with almost half of those surveyed for this report recording air travel as “essential” to their wellbeing.

At Airservices, our mission is to provide safe, secure, efficient and environmentally responsible services that connect the aviation industry with the community. Understanding the emerging trends that will shape the aviation industry in the future will help us with our partners to respond innovatively to the challenges that lie ahead.

Given just how important air travel has become to so many Australians, this mission has never been more critical.



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1 How Australians have prioritised travel after COVID

A passion for travel has been reignited

Post-lockdown, fewer than 5% of the population expect to fly less, suggesting a positive outlook for the travel industry. In fact, it seems lockdowns sharpened appetite for travel, particularly for the young.

1 in 4 (25%)

Australians have taken an international flight

1 in 2 (49%)

Australians have taken a domestic flight in the last 12 months

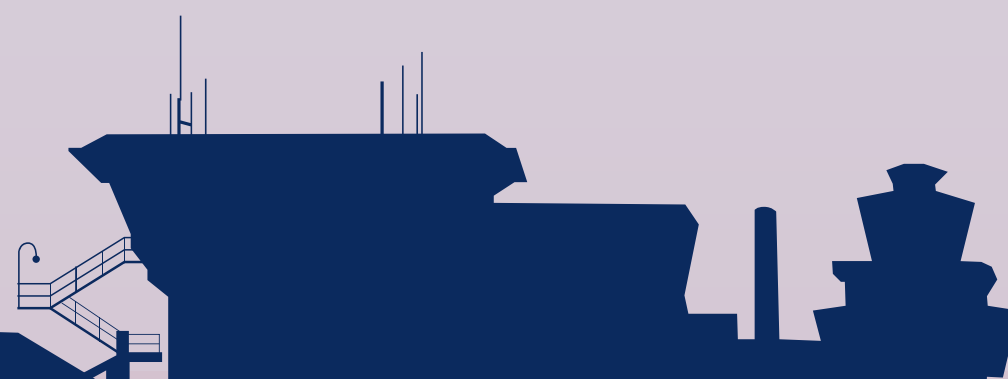
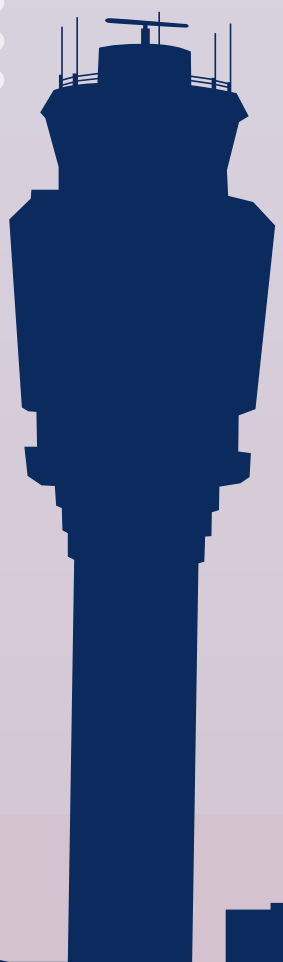
These numbers increase for those aged 18-29.

38%

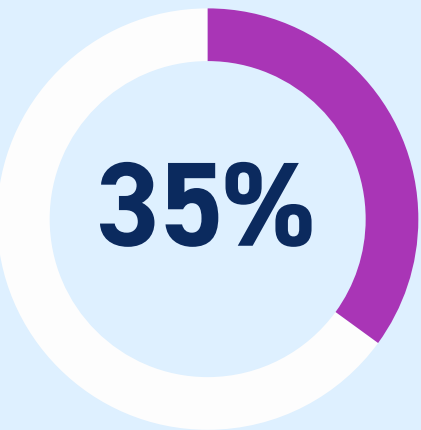
have taken an international flight

65%

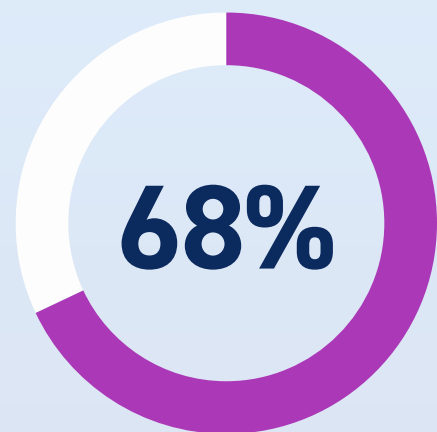
have taken a domestic flight in the last 12 months



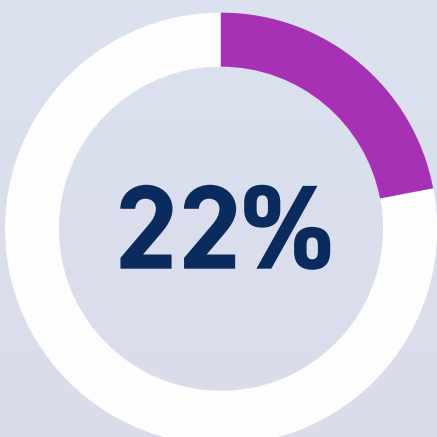
Looking to the future, the majority of Australians are planning to take to the air.



are expecting to fly more for holiday and leisure than they did pre-lockdowns.

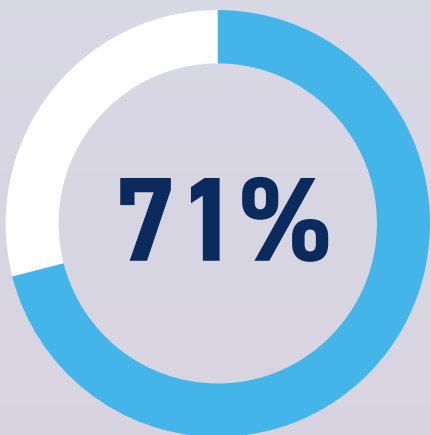


plan on going at least one domestic trip

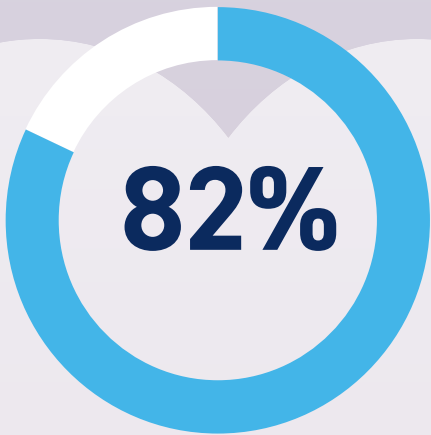


plan on going on three or more domestic trips.

Again, Australians under 30 are eager to get to the airport.



want to go on one or more domestic trips

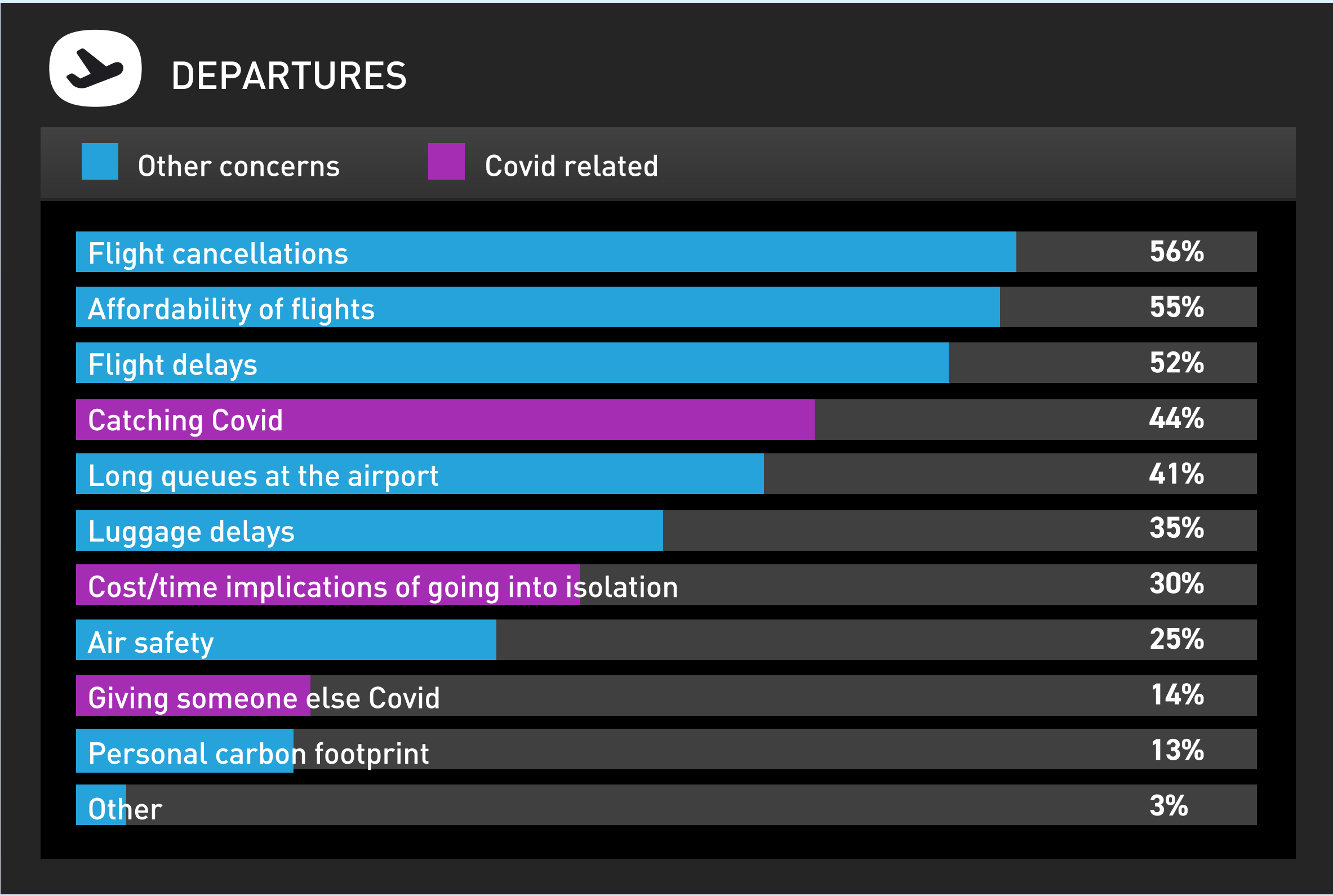


want to go on one or more international trips



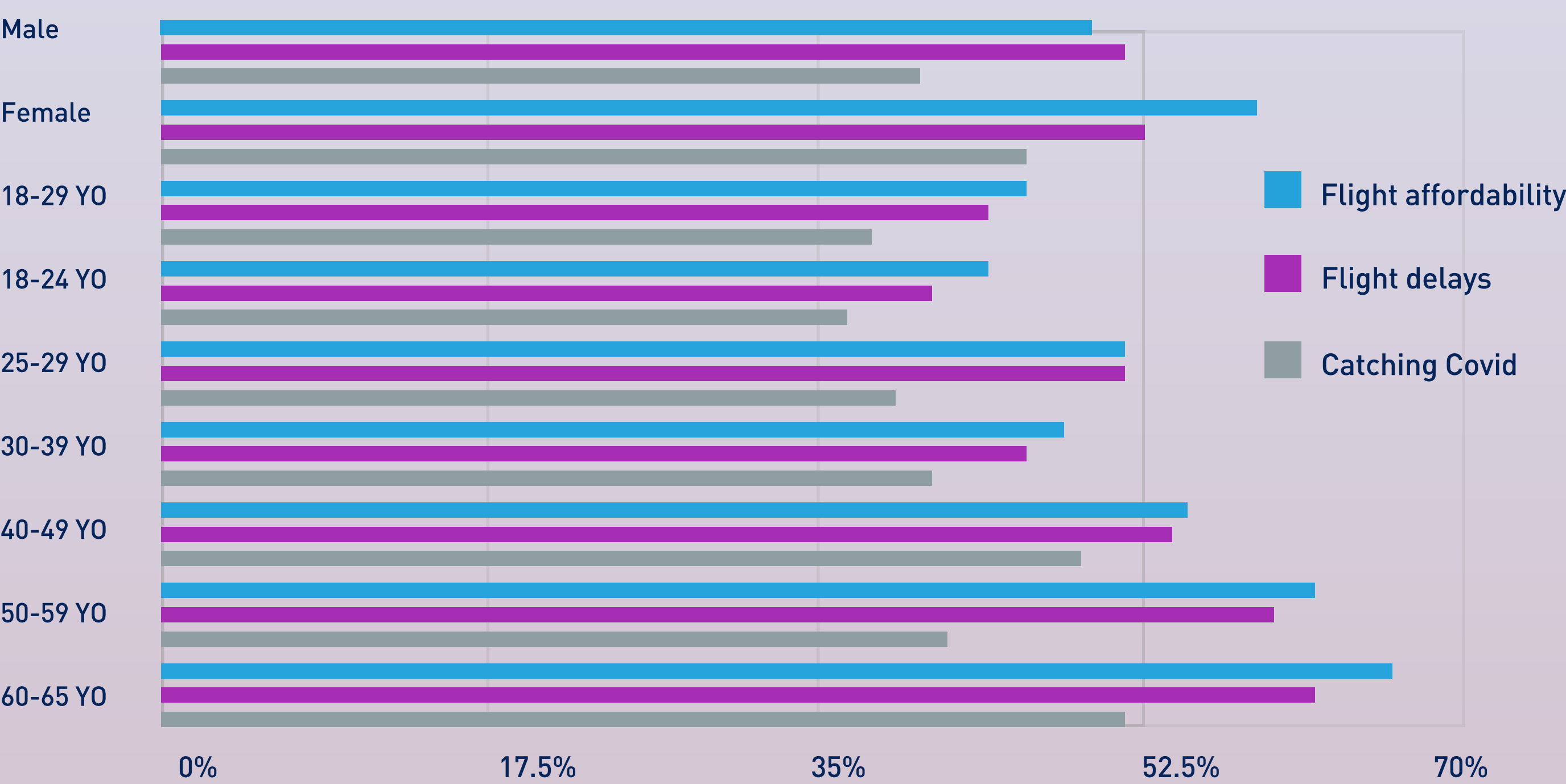
While COVID remains a consideration, other concerns have superseded it — the mindset of travellers is shifting.

Flight delays, cancellations and the affordability of travel all rated more highly as concerns than catching COVID, passing it on to someone else, or worries about quarantine/isolation.



This is perhaps not surprising given 55% of travellers have been personally impacted by flight cancellations in the past 12 months.

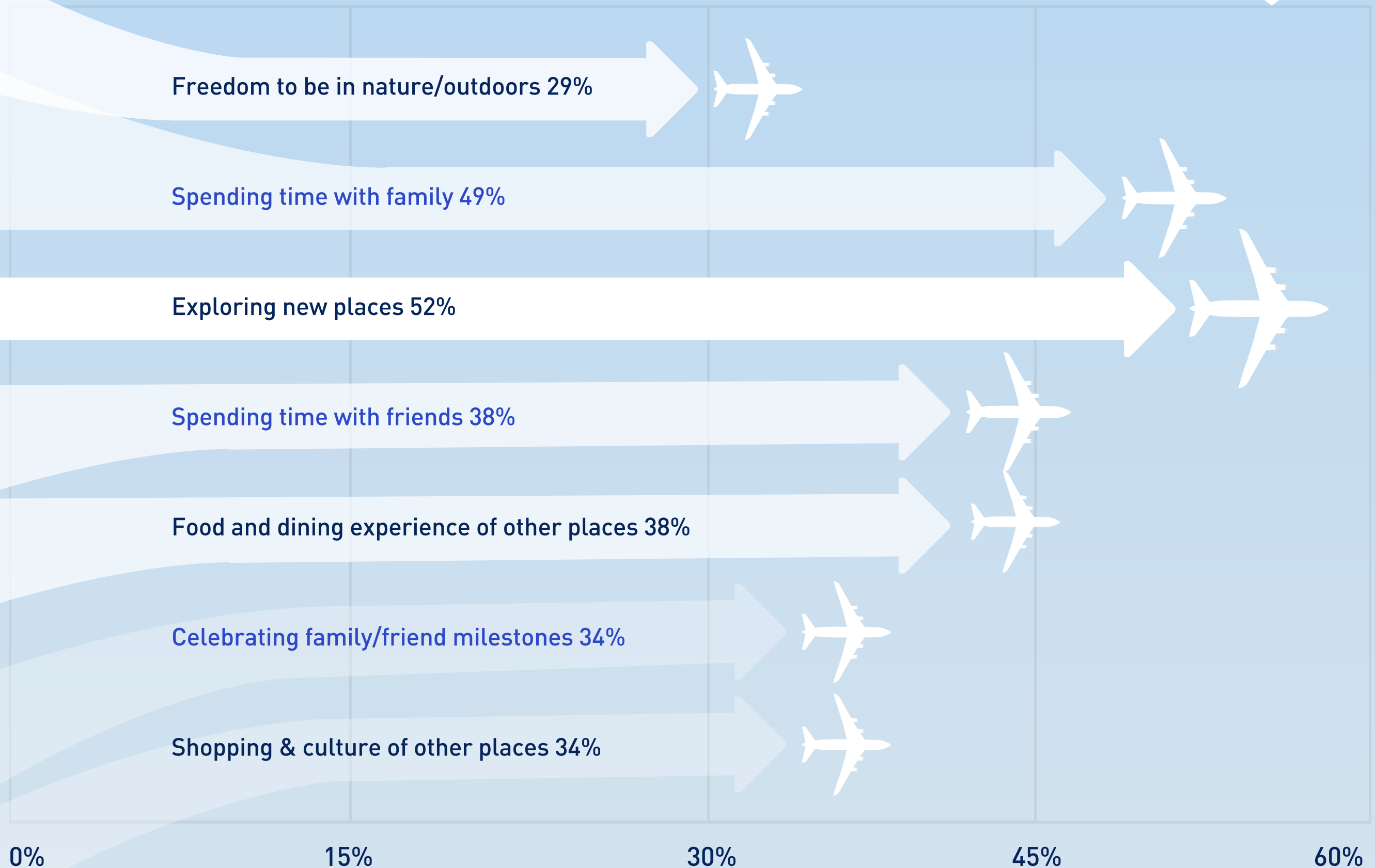
While there were demographic differences, flight affordability and cancellations rated more highly as concerns regardless of age or gender



2 Why Australians Travel

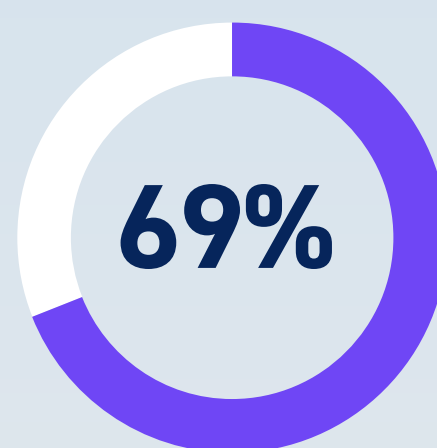
An age of exploration and wellbeing

When asked about the emotional reasons people missed air travel during lockdown, the reason given most often was exploring new places, but connecting with family and friends were prominent.

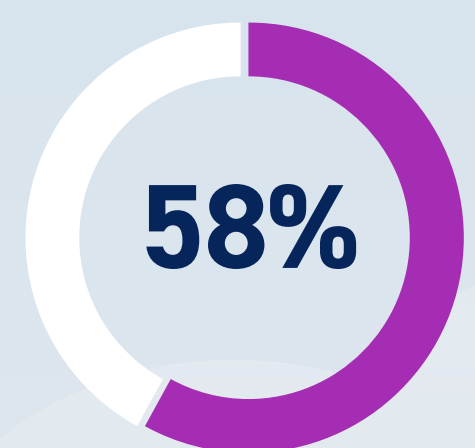


When asked, only 19% of people said they don't ever fly for the purpose of visiting friends. This number drops to 16% for visiting family.

Digging into the data, it's not surprising why. Flight is a key connector between friends and family that don't live close to one another.



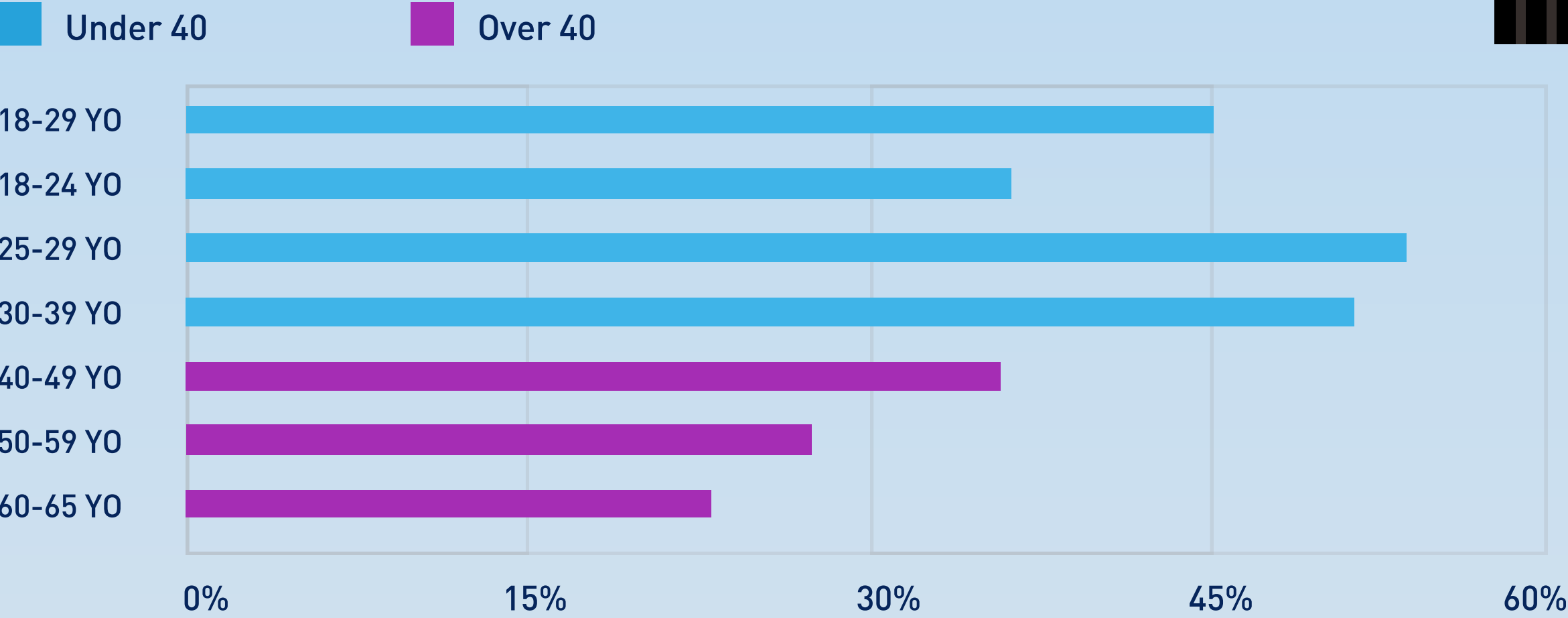
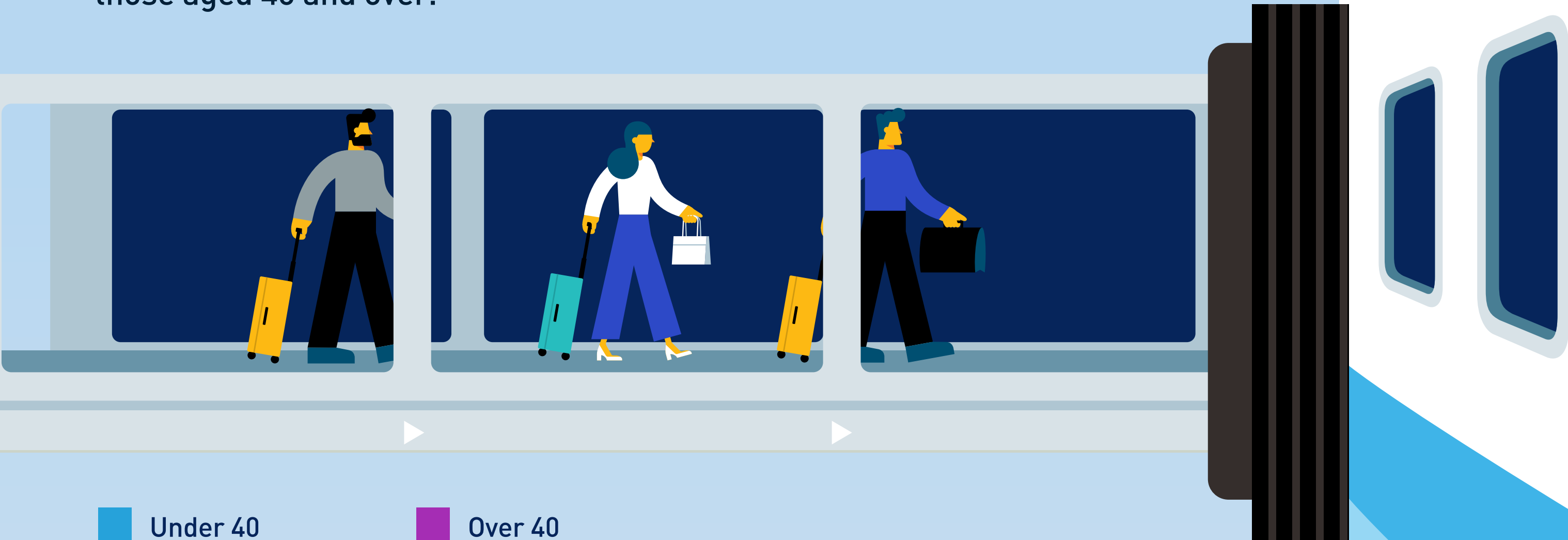
of people have family or friends living in a different Australian state or territory from them.



of people have family or friends who live overseas.

Air travel is a crucial part of people’s lives, with over a third (37%) saying it was essential to maintaining their sense of wellbeing

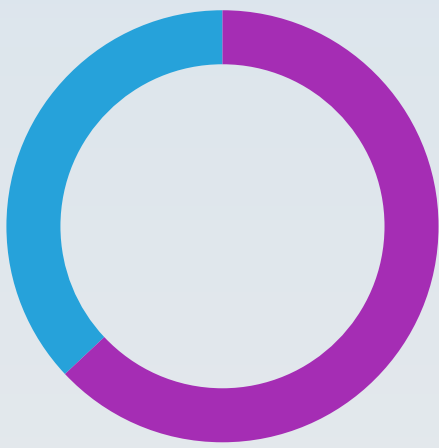
Younger people were more likely to agree that it was essential than those aged 40 and over.



There wasn’t only a generational divide when it came to this question of wellbeing. There was a noticeable gap between those living in regional and metro areas.

41% of those in metro areas said air travel was essential to their wellbeing, compared to 31% in regional areas. This might be linked to the fact that people in metro areas are far more likely to have family and friends living overseas.

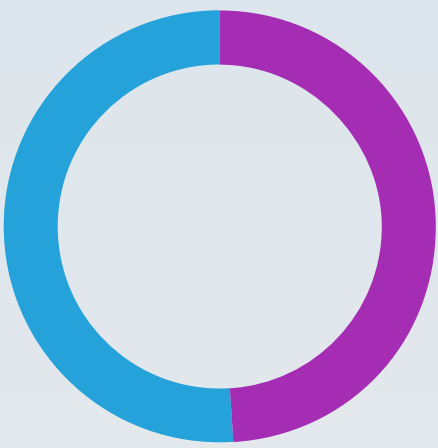
Metro



63%
Have family/
friends overseas

37%
Don't have family/
friends overseas

Regional



49%
Have family/
friends overseas

51%
Don't have family/
friends overseas

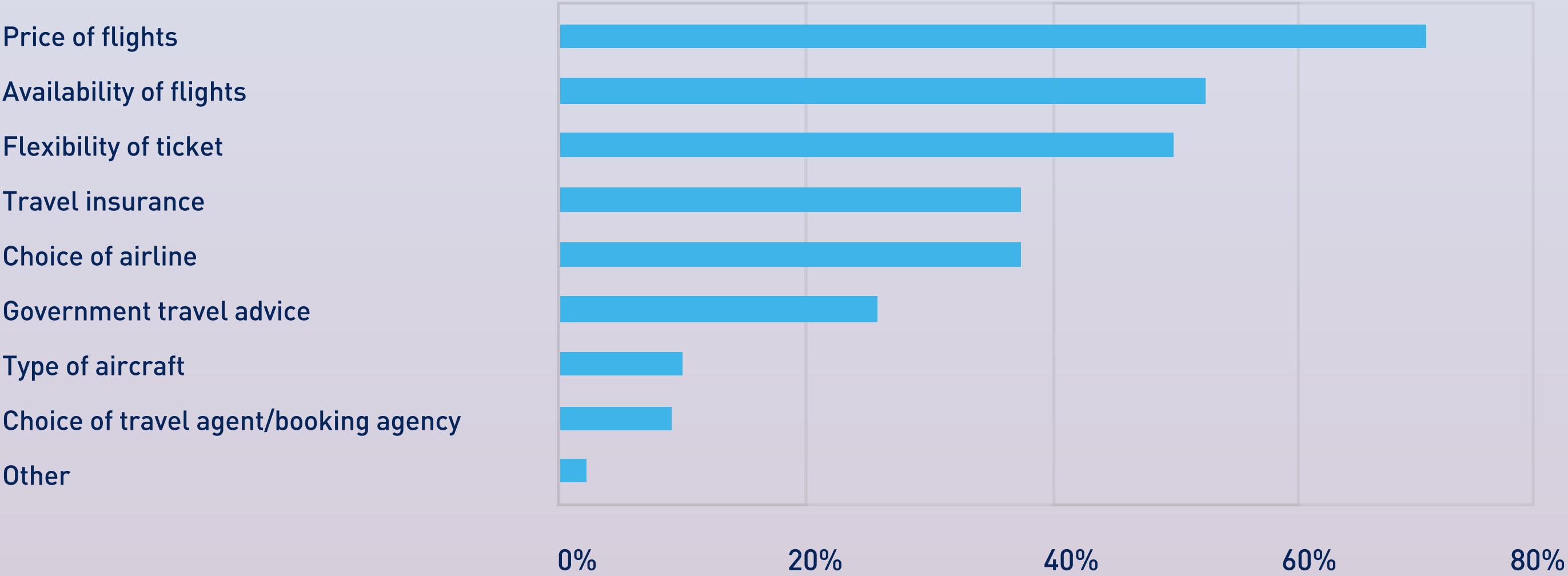
3 The changed way people fly

New expectations for a new era

Overall, people have different expectations of air travel post-lockdown.



When asked what travel needs were important to them when planning a trip, 71% said the price of flights and 53% said the flexibility of their ticket.

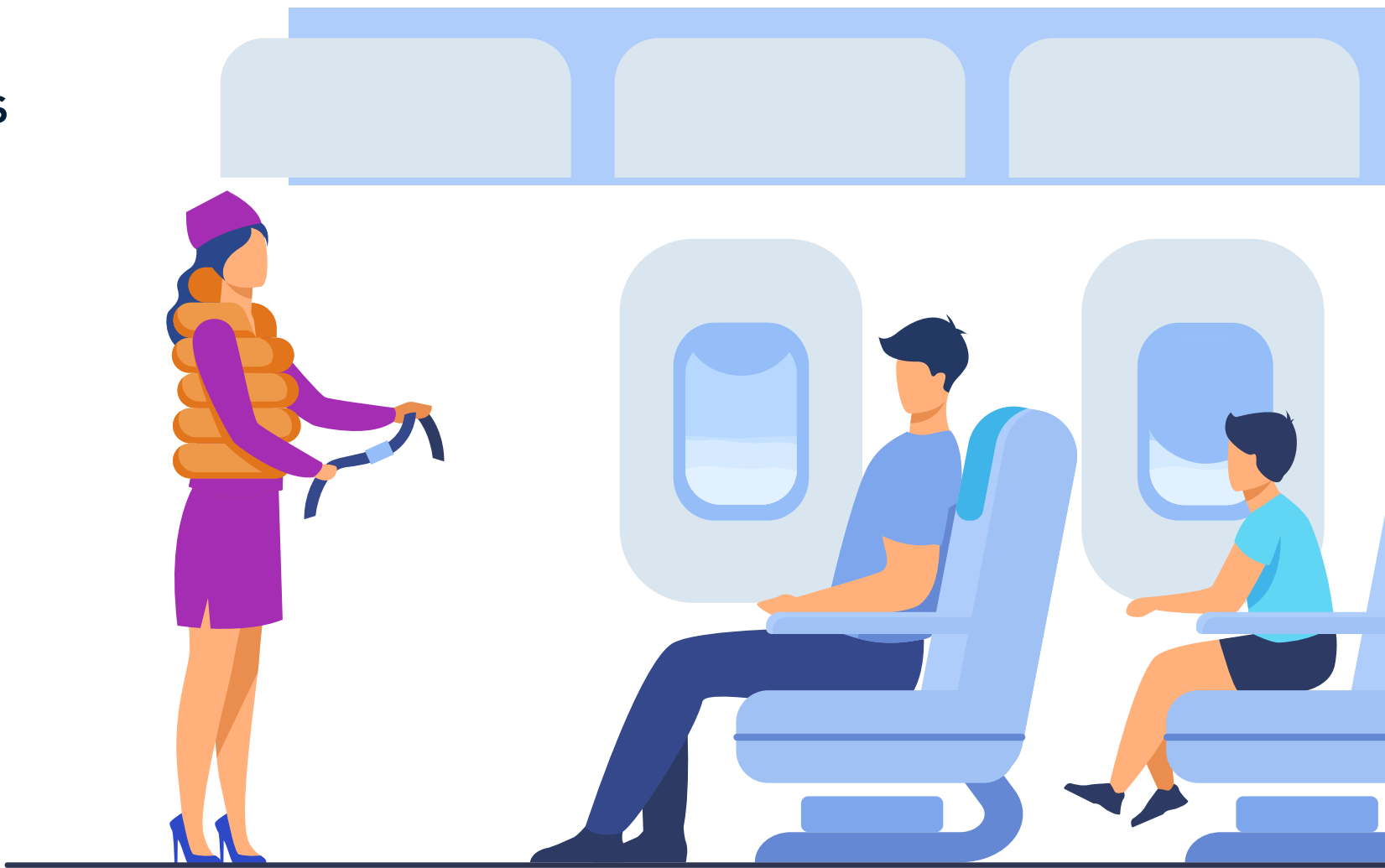


That being said, a noteworthy minority (1 in 4) agreed that they were “willing to pay more just to be able to travel again”.

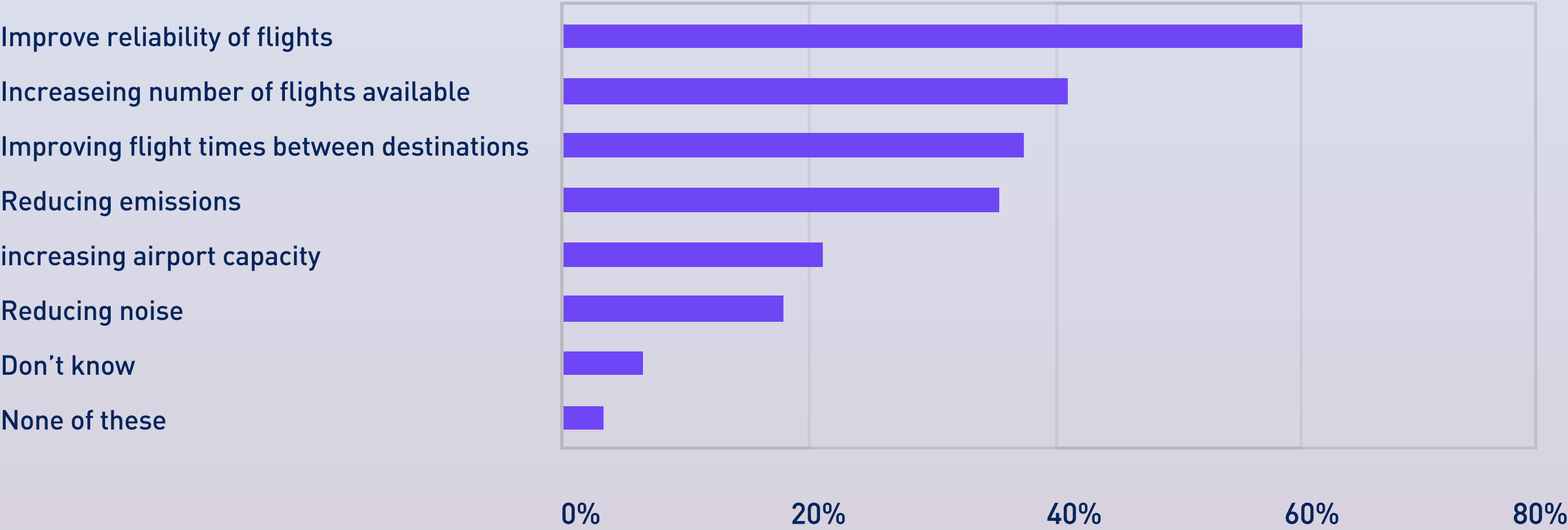
When it comes to expectations for the air travel industry going forward, there are a variety of opinions.

In good news, a significant majority of Australians have faith in their country’s air safety.

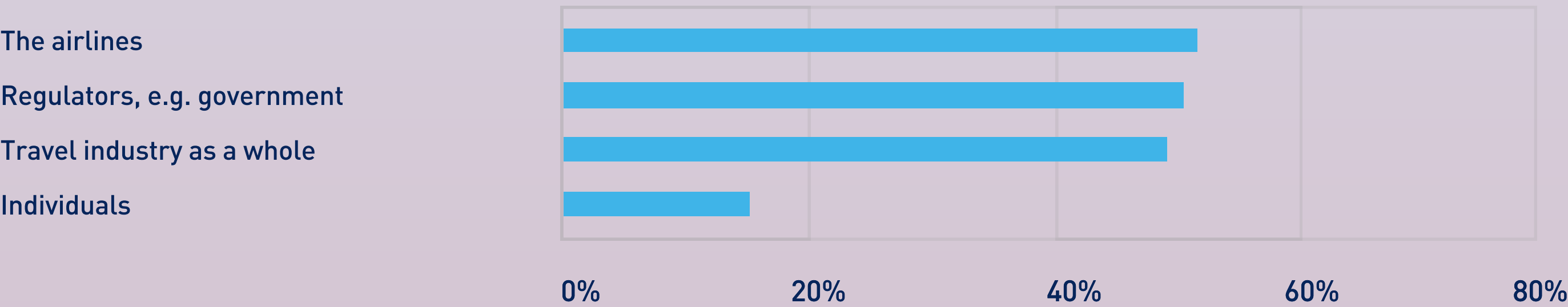
- 64%** believe Australian air travel safety is ranked highly by global standards
- 62%** believe Australian air travel safety standards have remained high consistently over the years
- 57%** believe Australia’s air safety is the best in the world



When asked what the industry’s priorities should be, “improved reliability of flights” achieved the highest level of agreement (61%). The next highest – “increasing the number of flights available” – was nominated by less than half of Australians (41%).



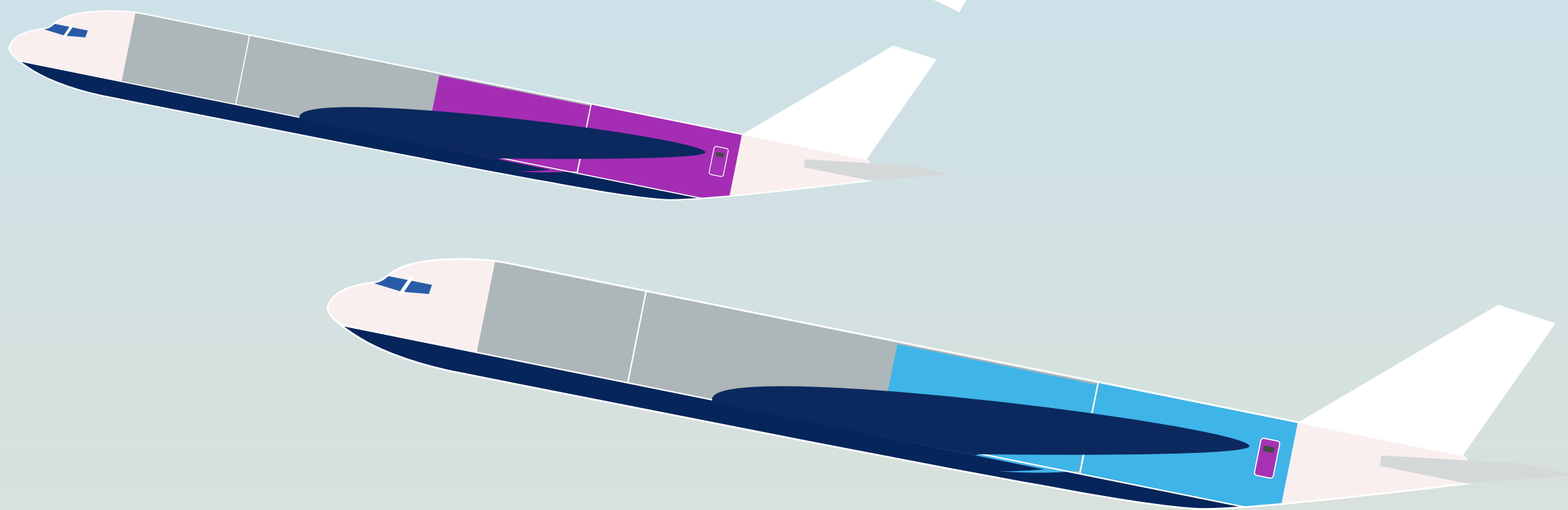
When it comes to sustainability, about half of people believe airlines and regulators have a responsibility. Far fewer (14%) believe individuals should hold any responsibility.



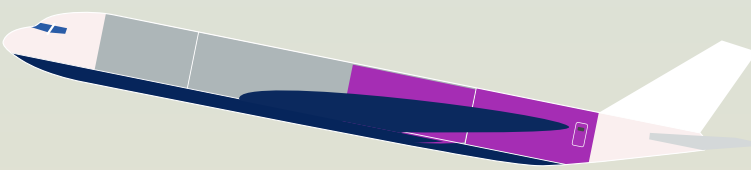
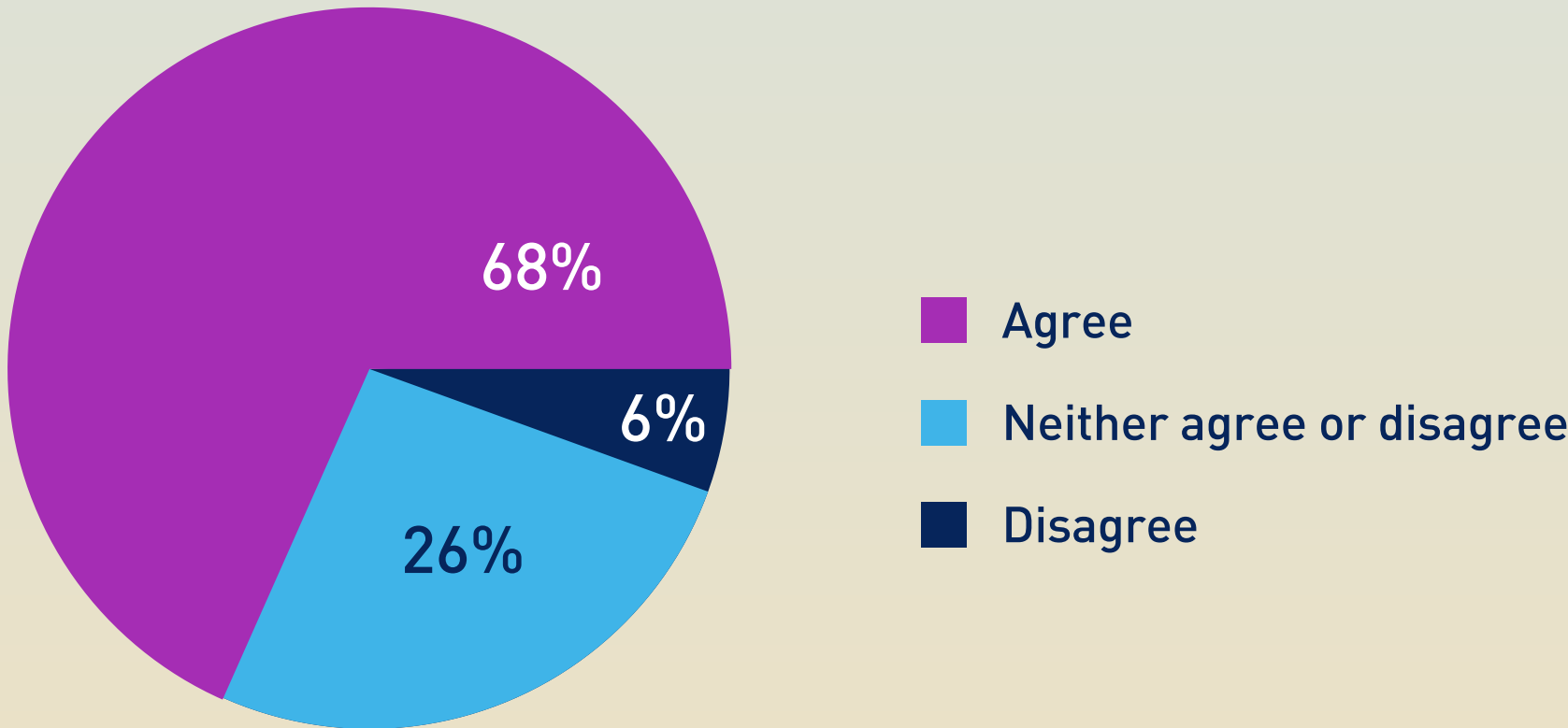
4 The importance of aviation to the economy

Flights are inextricably linked to how many of us work

There is broad agreement that air transport plays an important role in Australia, both in terms of work and the economy.

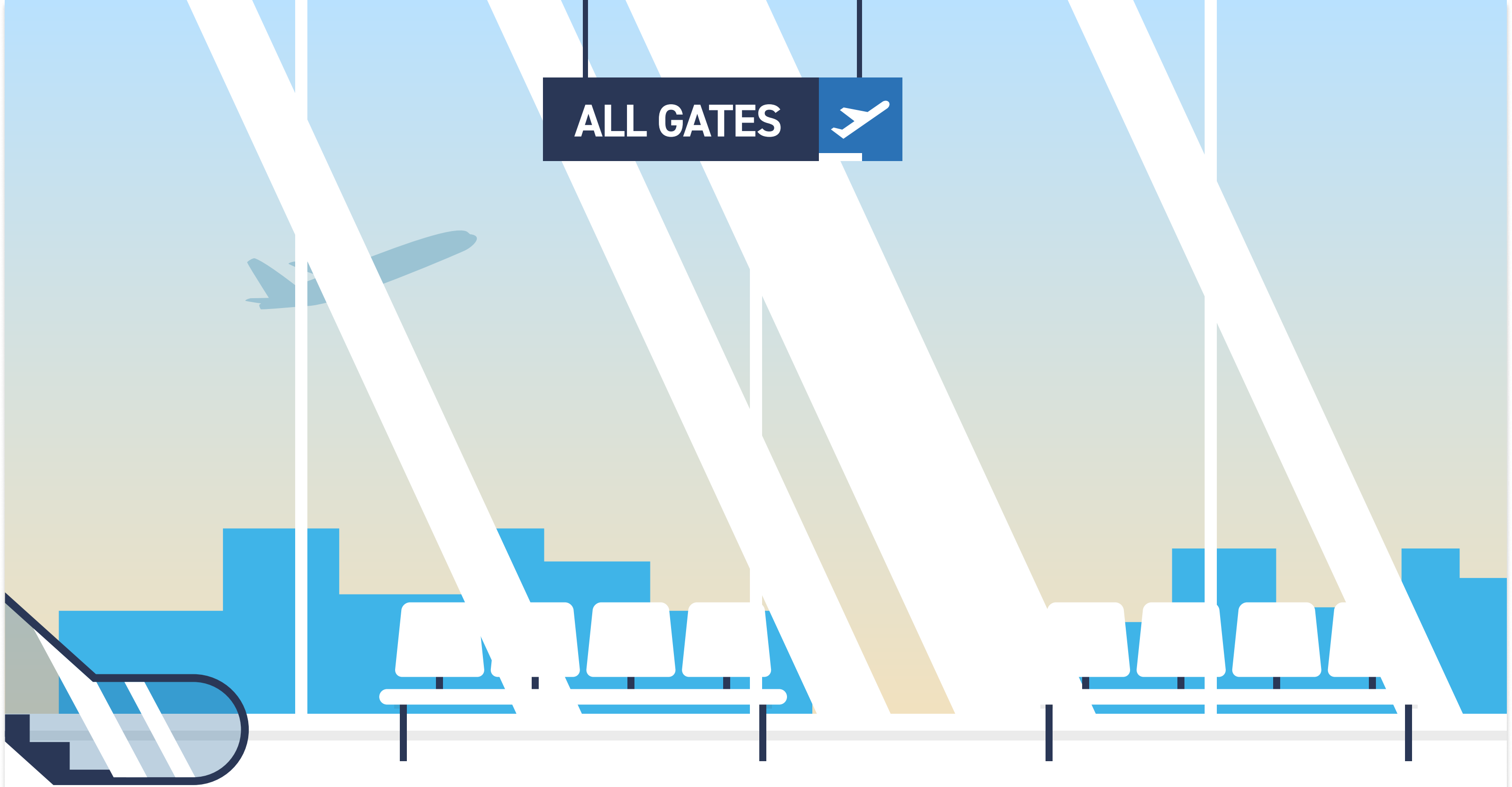


When asked if they agreed or disagreed that “Air transport is an important driver of jobs and our economy” only a tiny minority disagreed.

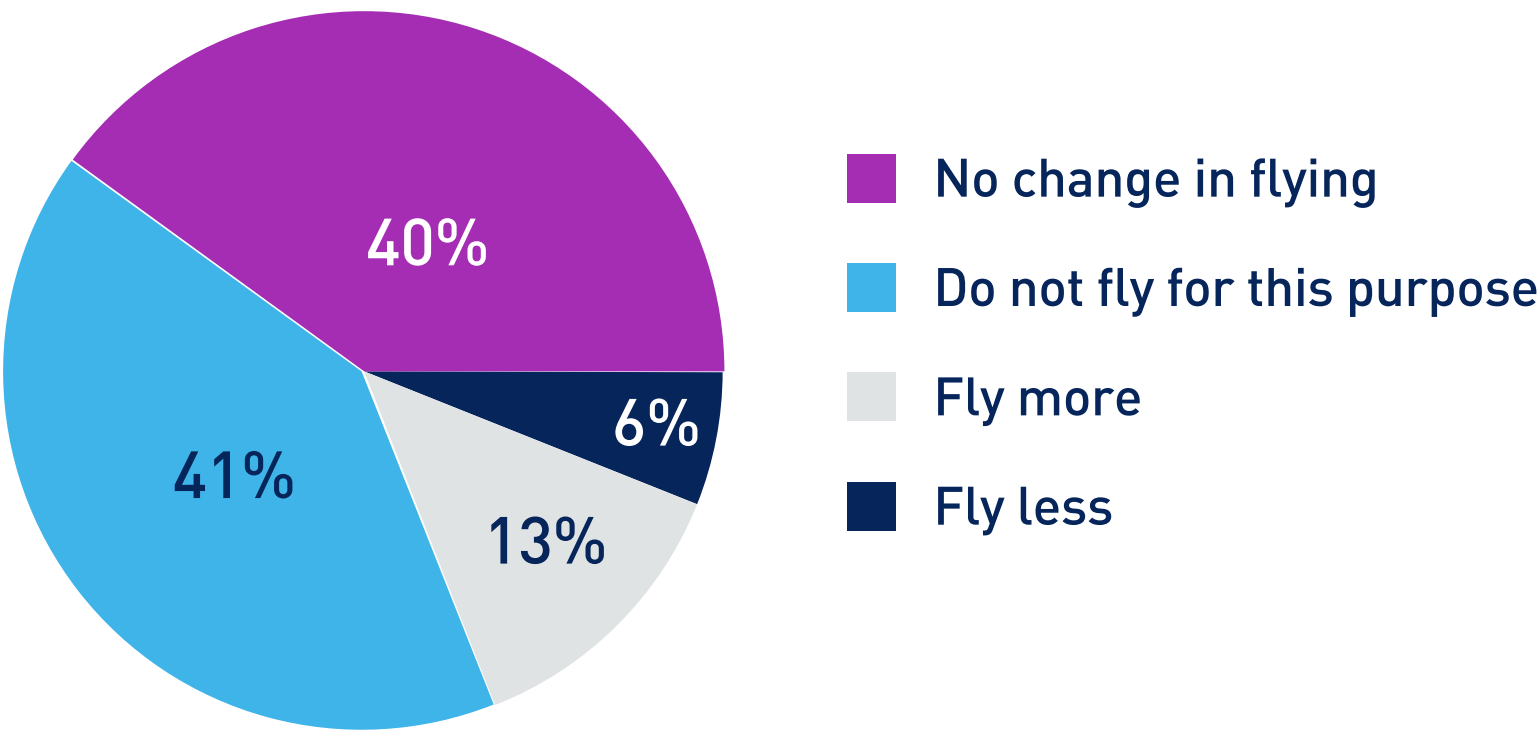


Asked about the direct impact air travel has on their work, over a fifth (22%) agreed it was “necessary for me to be able to do my job”. A quarter (25%) agreed “air freight is necessary for my business”.

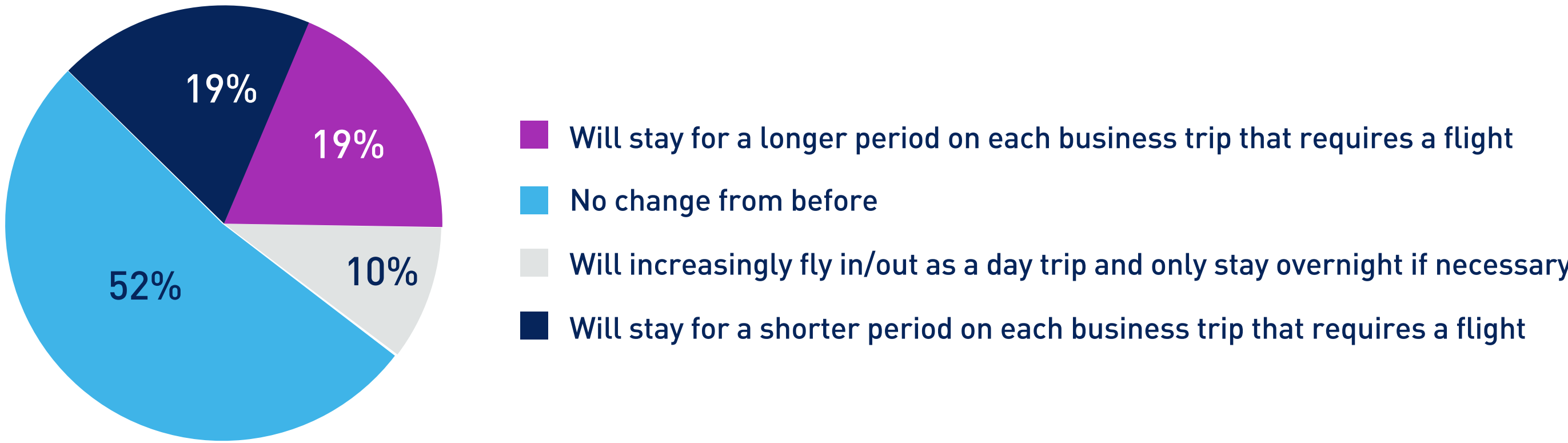




Coming out of lockdown, 13% of people expect to be flying more for work as compared to 6% who will be flying less.



For work trips, most people (52%) said that post-lockdown their behaviour will not change. Otherwise, there was a notable minority that said they would be aiming for either shorter work trips or even day trips where possible.

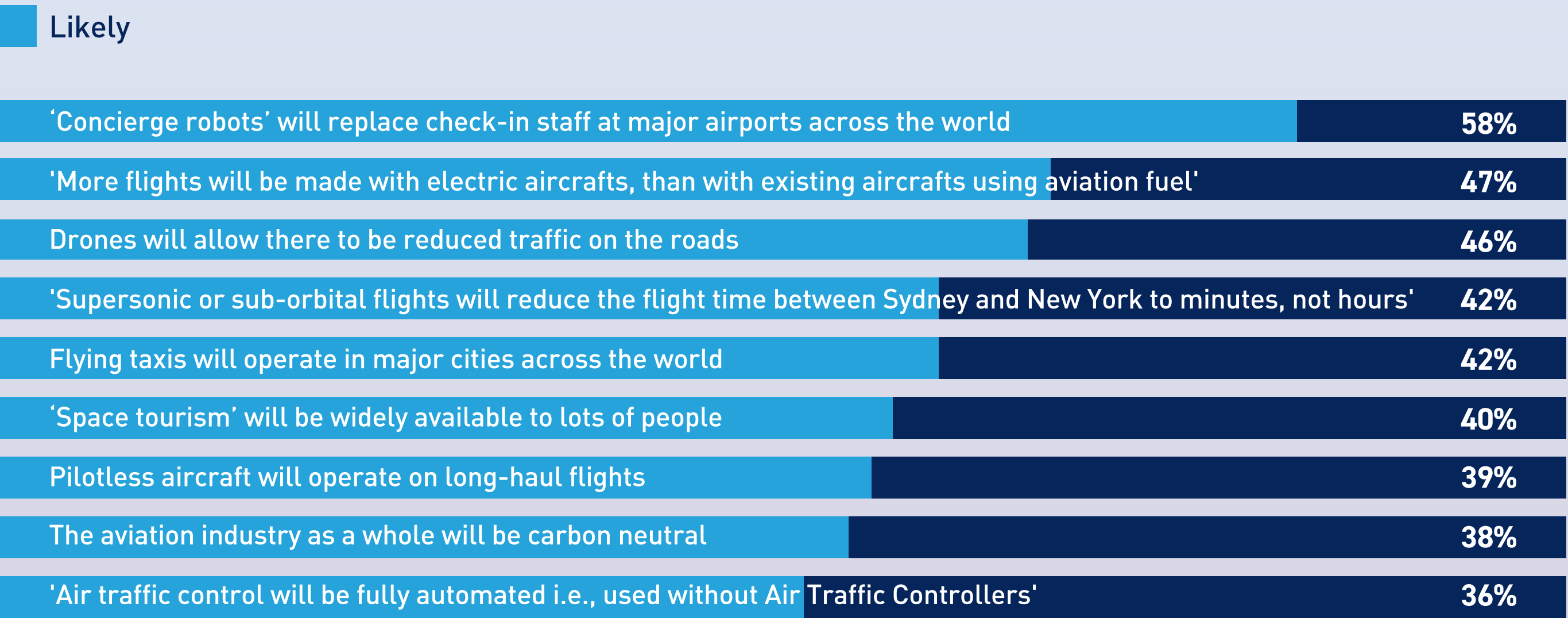


5 The future of aviation?

Australians foresee huge advances in the decades ahead.

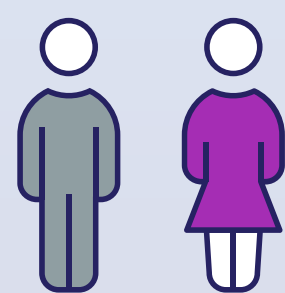
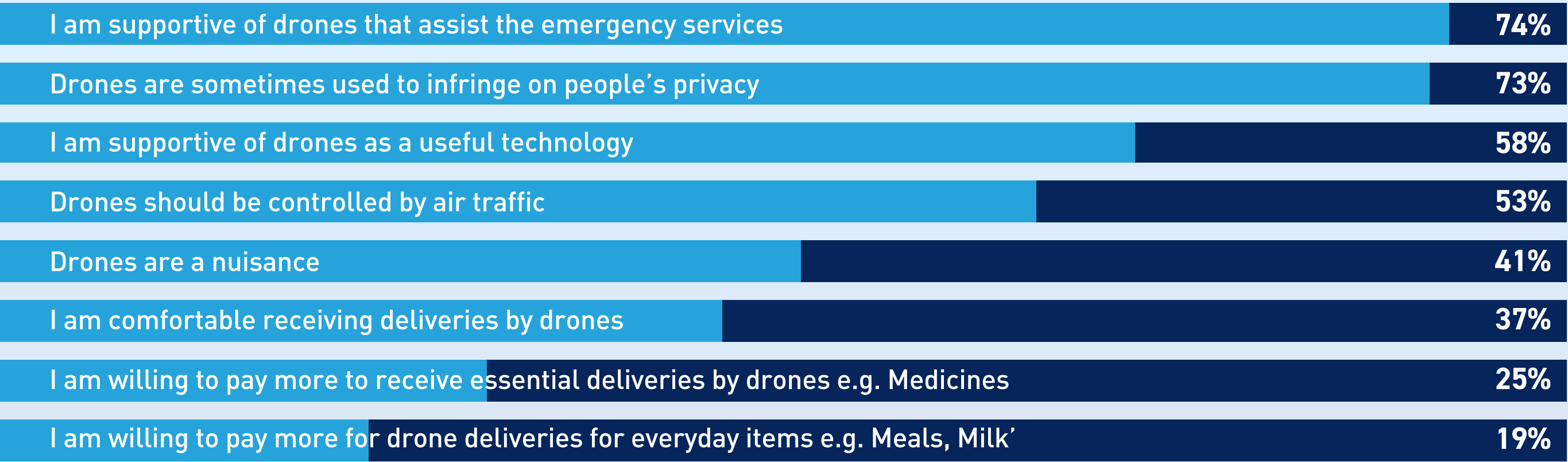
While no one has a crystal ball, it is interesting to know what Australians perceive as the future of air travel.

When asked about the likelihood that various technologies would be available in 30 years, only one had over 50% of people labelling it likely — that ‘concierge robots’ will replace check-in staff at major airports across the world.

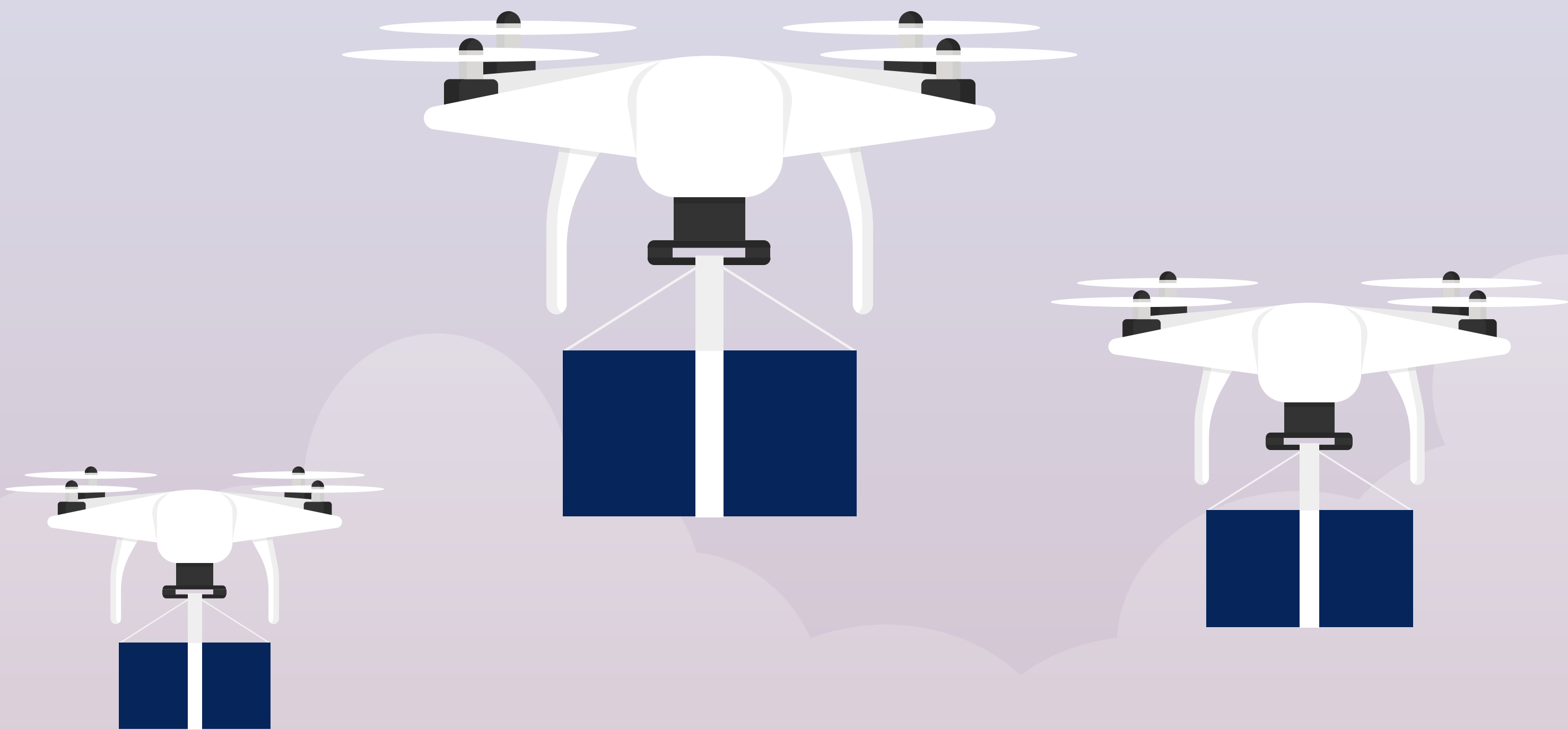


When it comes to drones, a cutting edge technology that is here today, Australians agreed they were useful. However, most felt they should be controlled by air traffic regulators and majorities only felt comfortable with their use in certain applications, such as emergency services.

That agree with following statements



Only 37% said they would be comfortable with receiving a delivery from a drone. In fact, only one age group had 50% of respondents agree they would be comfortable with such a delivery – those aged 30-39.



6 Demographics

The research was carried out by Ipsos.

Data was collected through an online survey of 1,000 adults aged 18 - 64 years old. It was a nationally representative survey by region, age and gender and data was collected from 9 - 16 September 2022.

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