



Preparing for take-off

Survey of Australians' air travel behaviour, experience and attitudes

Executive Summary



Executive Summary

Background

The Australian Government's *Aviation White Paper – Towards 2050* recommends 56 policy initiatives to support the Australian aviation industry into the future.

The White Paper recommended establishing an Aviation Consumer Ombuds Scheme (ACOS) and the Aviation Consumer Rights Charter, to support “a better passenger experience” and to hold the aviation sector accountable for delivering on its obligations to customers.

What we did

BETA partnered with the interim ACOS Team at the Department of Infrastructure, Transport, Regional Development, Communications, Sport and the Arts (DITRDCA) to understand the attitudes and behaviours of Australians travelling by air. The research aims to inform the development of policy initiatives and track their impact over time.

BETA's research involved surveying a weighted representative sample of 4,000 Australians, to understand the travel behaviors of Australians and their travel experiences over the last year.

What we found

One in 2 (56%) Australian adults travelled by air in last 12 months*, with most flying more than once. Around 1 in 4 (24%) of these travelers identified as having a disability, health condition or injury.

Overall, most customers were satisfied with the air travel experience

- Around 4 out of 5 travellers were satisfied with the airport (78%) and the airline(s) (77%) they travelled with throughout the 12-month period*.

More than half of travelers experienced a flight disruption

- 55% of Australians experienced a flight disruption in the last 12 months.
- The main disruption type was a 'flight delay of between 15 minutes and 3 hours' (43% of total sample).
- Only 31% of the travelers experiencing a disruption were satisfied with how their disruption was handled.

Fewer than 1 in 10 travelers made a complaint

- 8% of travelers made a complaint in the last 12 months.
- An additional 3% intended to make a complaint about a disruption or issue in the last 12 months, but either did not start or complete the process.

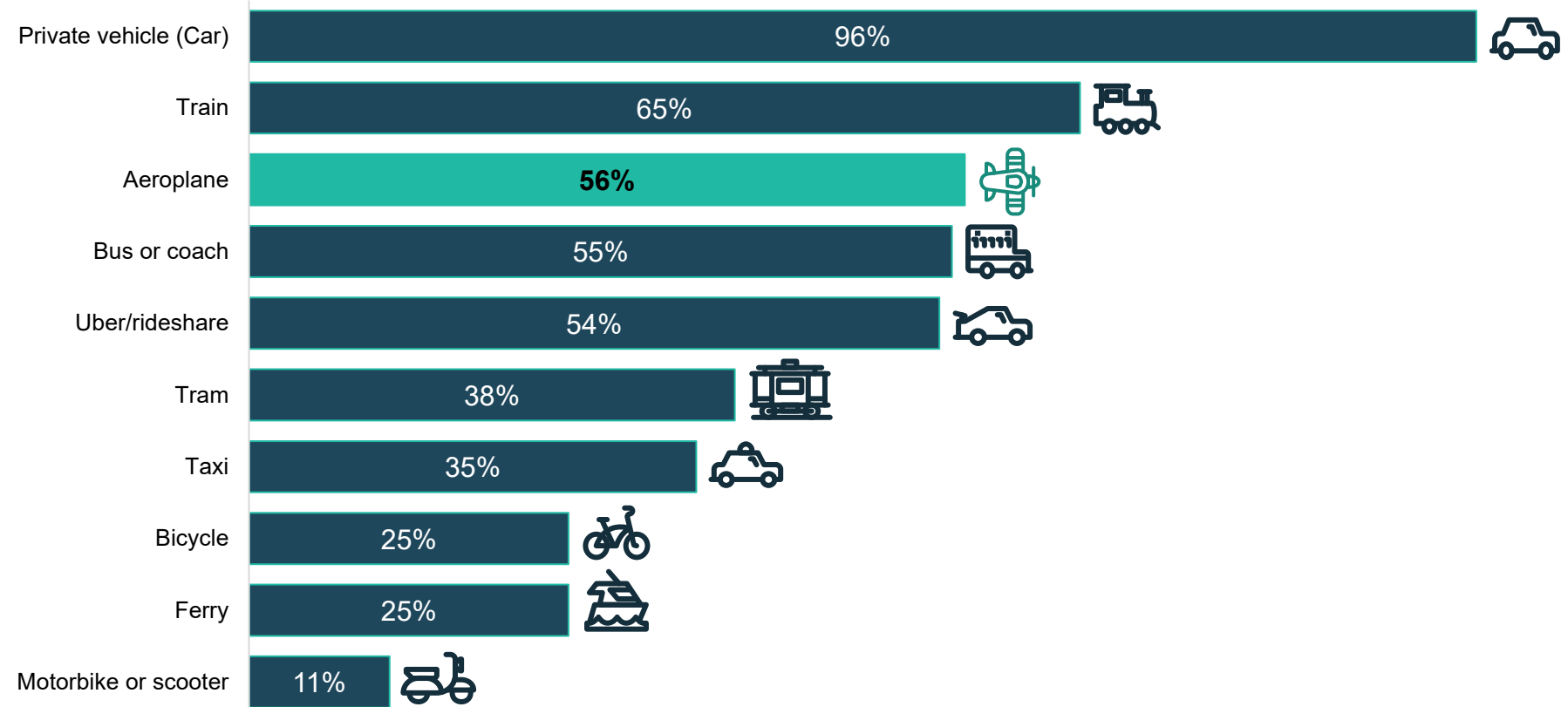
Knowledge and understanding of consumer rights is low

- Most Australians self-reported having a low level of understanding of their air travel consumer rights, and the assistance available to them.

Australian modes of travel

In the last 12 months, 56% of Australians travelled by air at least once

Modes of transport used by Australians in the last 12 months

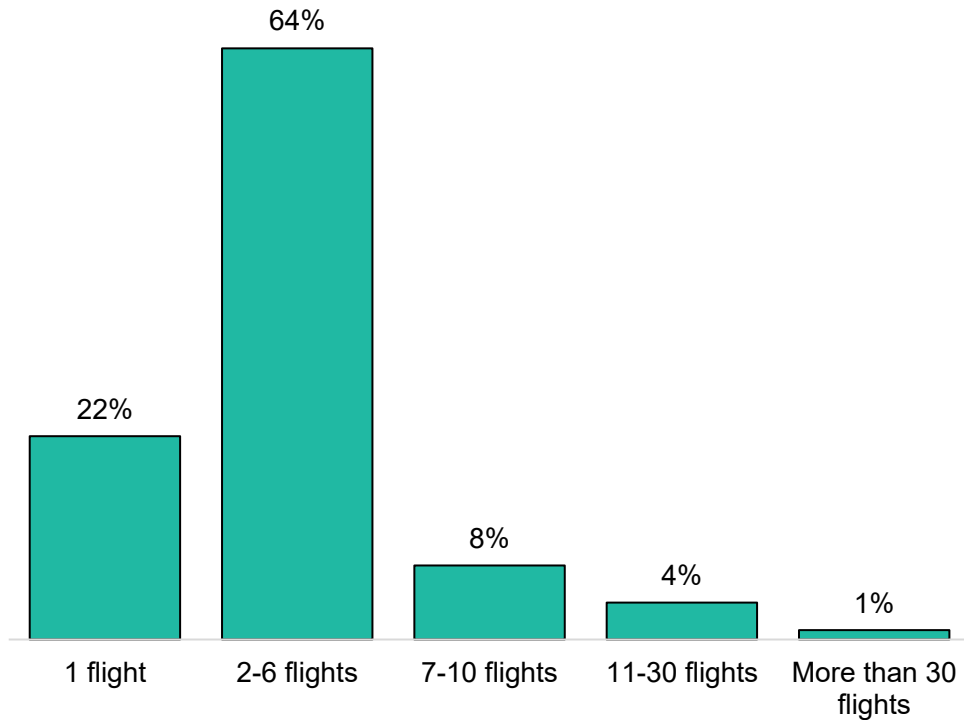


Commercial aviation was the third most popular mode of transport in the last 12 months.

Four out of 5 Australians (80%) had taken at least one commercial flight in the past 5 years.

Frequency and purpose of air travel

Most respondents took between two and six flights in the last 12 months.

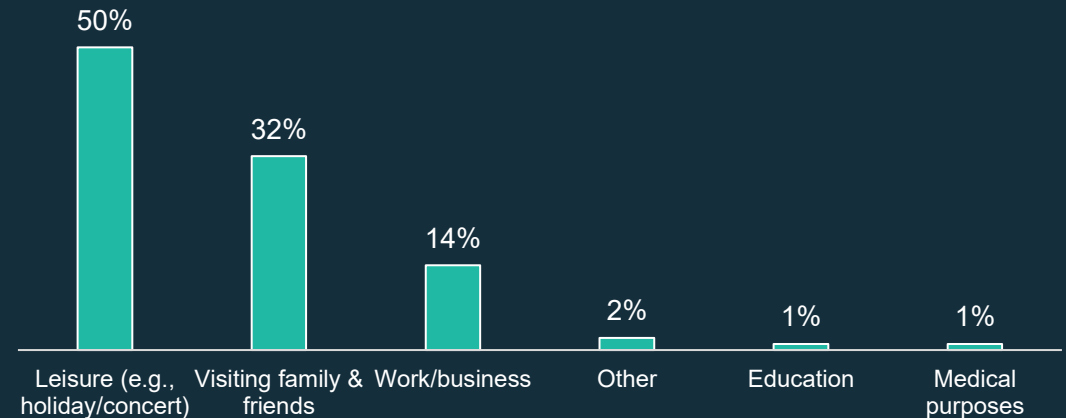


"How many commercial flights from an Australian airport have you taken in the last 12 months (between 28 August 2024 to 27 August 2025)? Either to travel within Australia or to go overseas." (n=4,008 - weighted)

The majority of respondents flew domestically on their most recent flight



The main purpose of people's most recent flight was leisure



"What best describes your most recent flight from an Australian airport?" (n=4,008, weighted) and "What was the main purpose of your most recent trip involving flights from an Australian airport?" (n=4,008 - weighted)

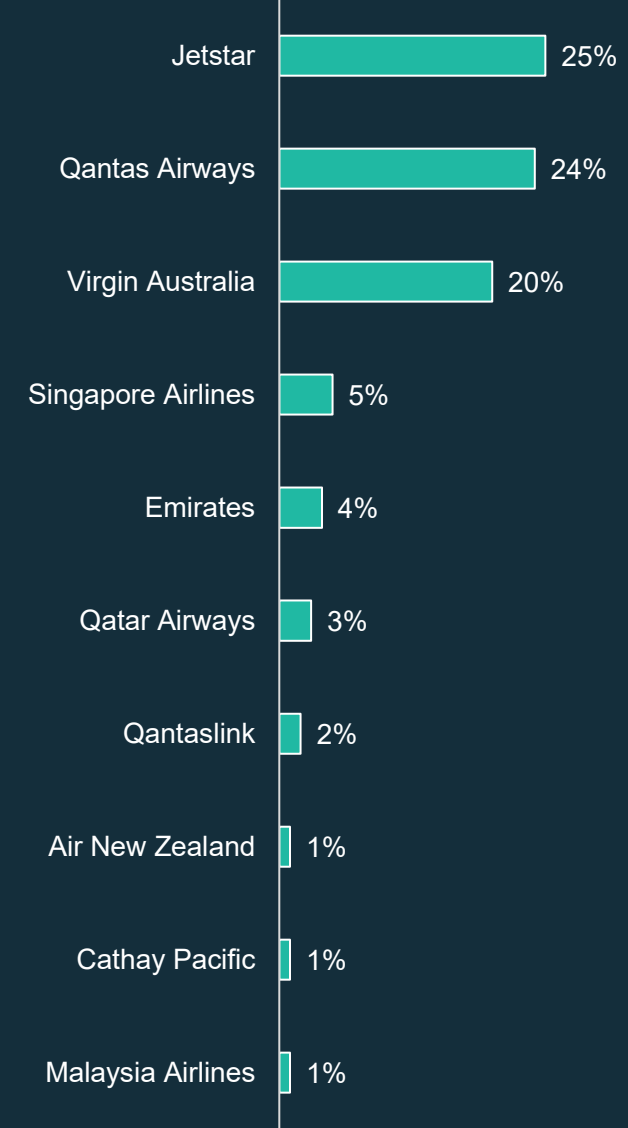
Australians' departure location and airlines

Most people departed from Sydney or Melbourne airport for their most recent flight.



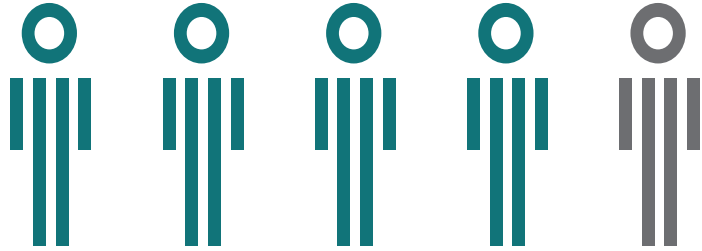
"Which Australian airport did you depart from?" (n=4,008 – weighted)

Top 10 Airlines most used by Australians



"Which airline did you fly with?" (n=4,008 – weighted)

Satisfaction with airlines and airports



Just under

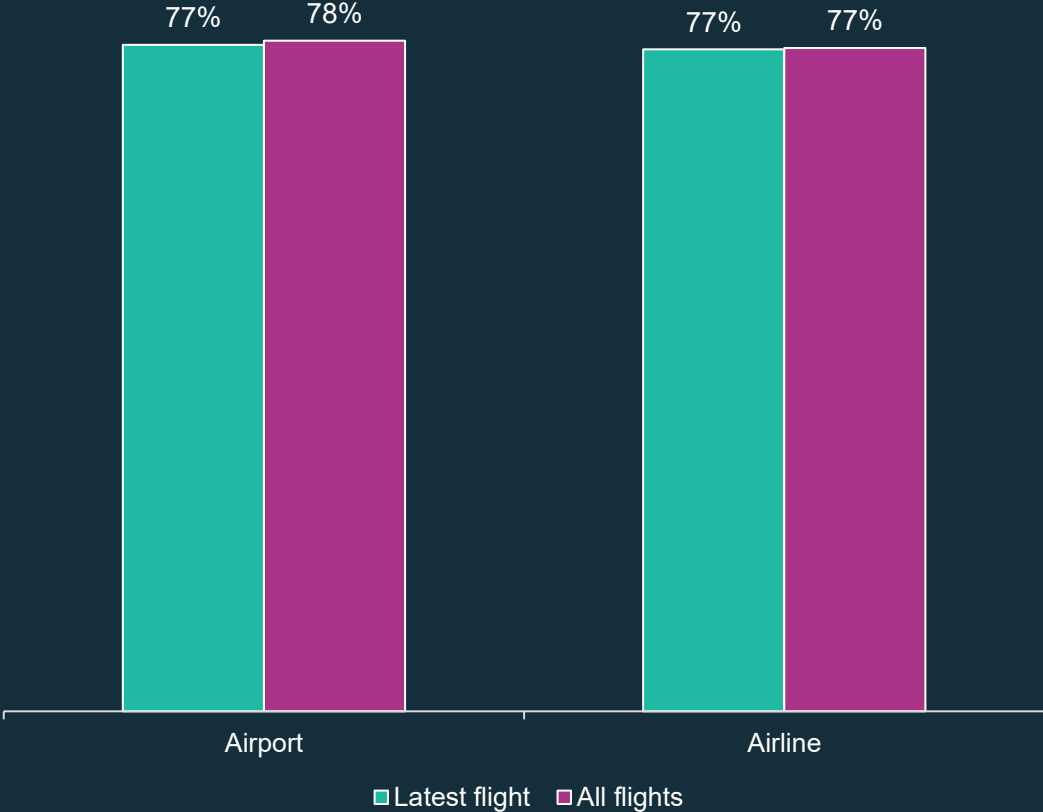
4/5 people (77%-78%)

were satisfied with the air travel experience

There was little difference between Australians' satisfaction of airlines and airports on their most recent flight, and among all flights taken in the last year.

"Overall, how satisfied or dissatisfied were you with [relevant airline]?" (n=4,008 – weighted); "Overall, how satisfied or dissatisfied were you with [relevant airport]?" (n=4,008 – weighted); "Thinking about all the flights you have taken departing from Australian airports over the last 12 months: Overall, how satisfied or dissatisfied were you with: - The departure airports" (n=3,200 – weighted); "Thinking about all the flights you have taken departing from Australian airports over the last 12 months: Overall, how satisfied or dissatisfied were you with: - The airlines" (n=3,200 – weighted)

Overall net satisfaction with airlines and airports across most recent flight and all flights in the past 12 months



Australians' experience with flight disruptions

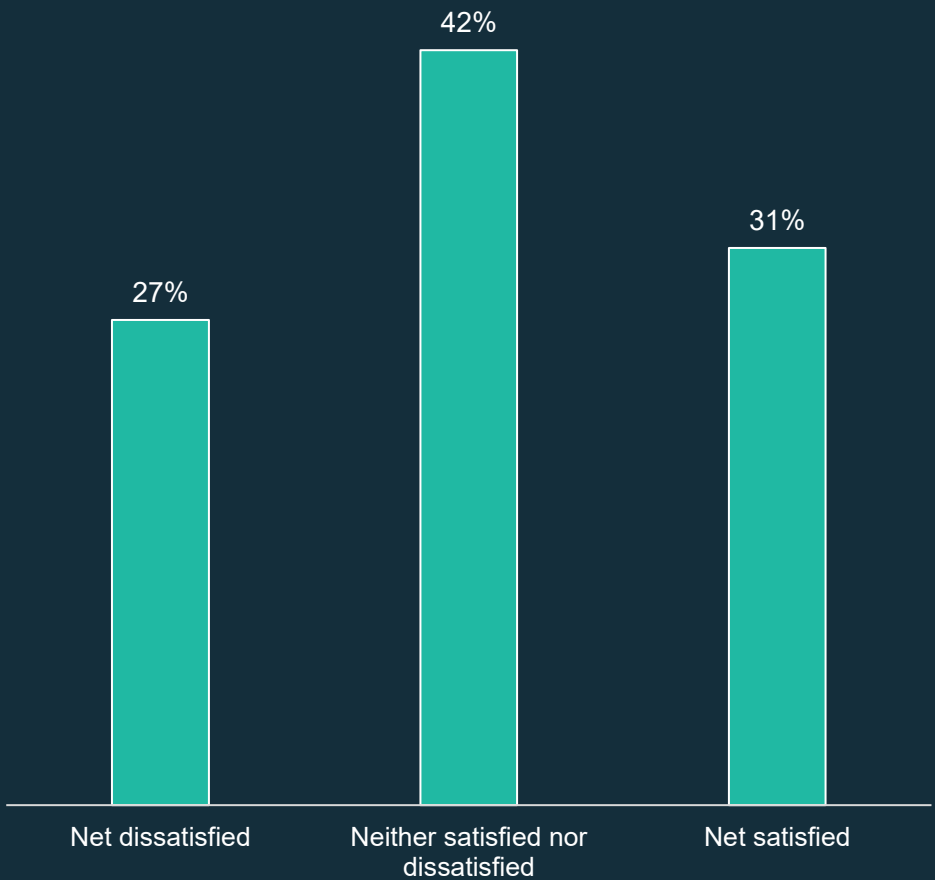


In total, just under
3/5 people (55%)

experienced a disruption on any of their flights within the last 12 months

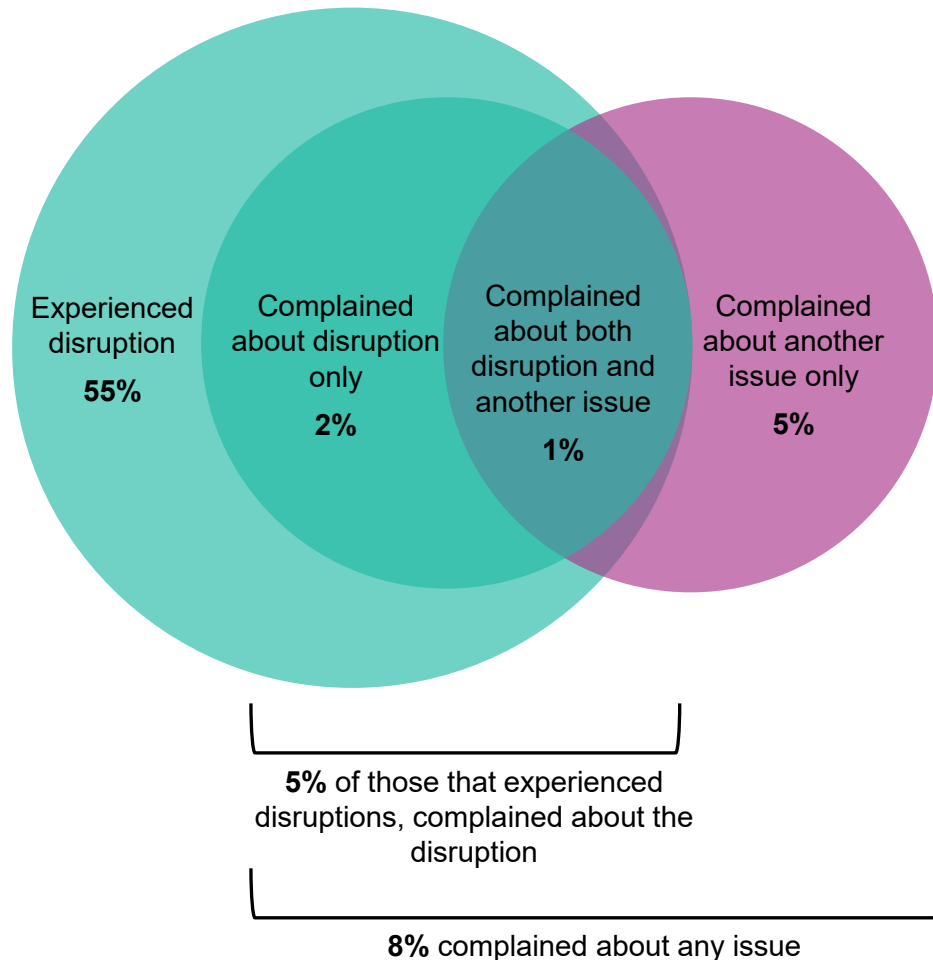
"Airline related disruptions are schedule changes that prevent passengers from reaching their destination on time. On your most recent flight...did you experience any of the following disruptions? Please select all that apply." (n=4,008 – weighted); "On any of your flights from an Australian airport in the last 12 months, did you experience any of the following disruptions? Select all that apply." (n=2,018 – weighted).

Less than one in 3 Australians were satisfied with how their air travel disruption was handled.



"Overall, were you satisfied or dissatisfied with how the disruption(s) were handled?" (n=2,228 – weighted, percentages refer to net satisfaction which is the proportion of respondents answering satisfied or very satisfied).

Complaint-making behaviour

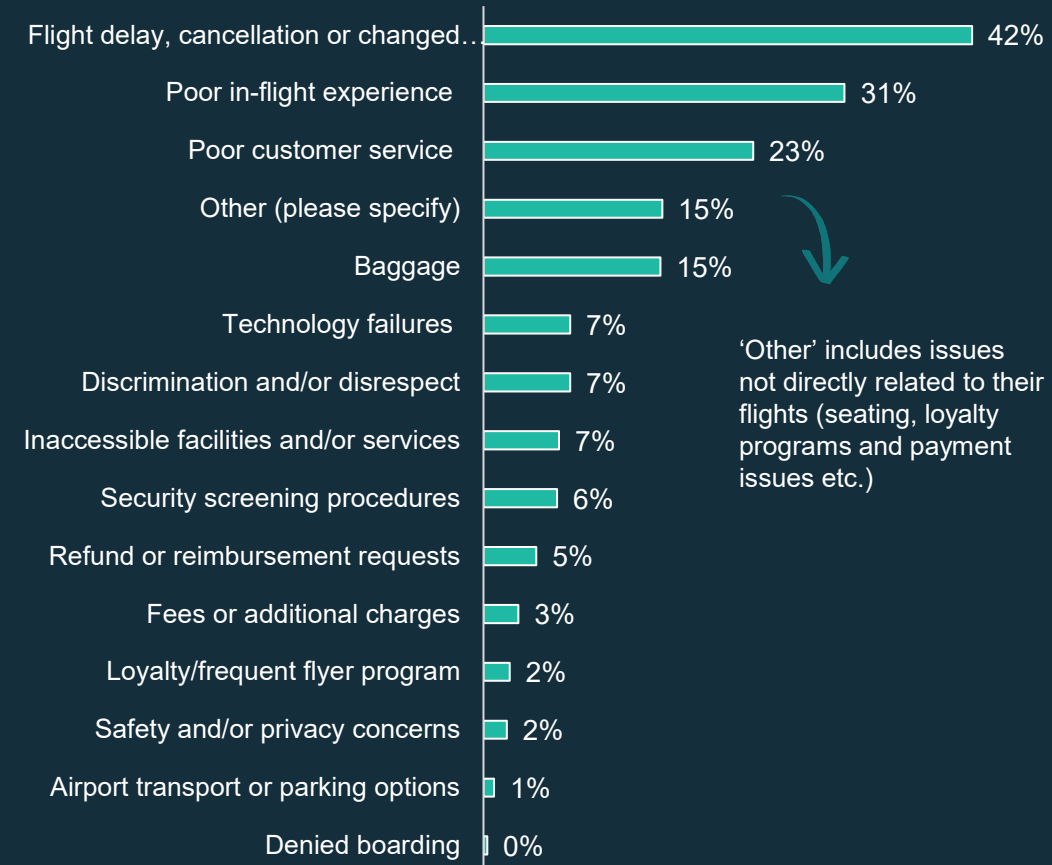


"Did you make a complaint about any issue involving your most recent flight from [airport]? A complaint is an expression of dissatisfaction made to or about an organisation, where a response or resolution is expected." (n=3884 – weighted); "Did you make a complaint about any issue involving any of your flights from an Australian airport in the last 12 months? A complaint is an expression of dissatisfaction made to or about an organisation, where a response or resolution is expected." (n=3034 – weighted); "What issue/s were your complaint about? Please select all that apply" (n=313 – weighted and merged)

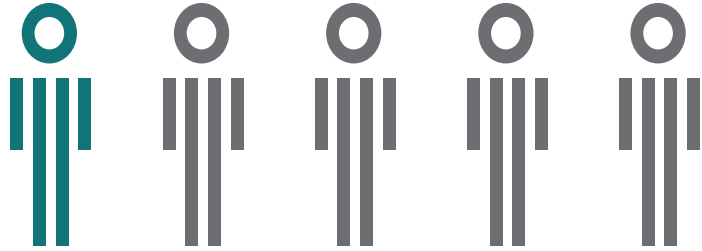
Intentions to complain

3% of Australians intended to make a complaint about an issue they experienced when travelling by air over the last 12 months, but did not start or follow through with doing so.

The issues Australians intended to complain about (but did not)



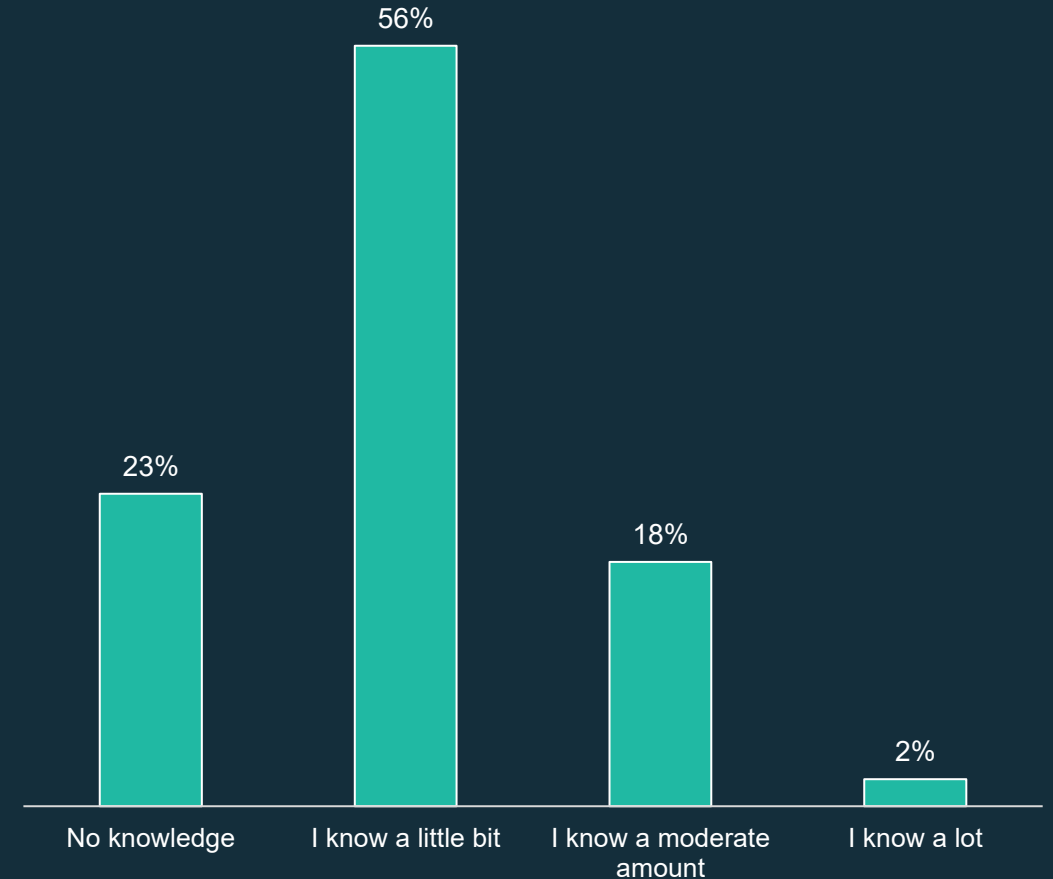
Knowledge of air travellers' rights



1/5 people (20%)

indicated they know a 'moderate amount' or 'a lot' about their rights when travelling by air

“How much knowledge do you have about your rights as an airline passenger?”



“All airline passengers have rights when they buy a plane ticket. Passenger rights include things like what you are entitled to if you flight is delayed or cancelled, or your baggage is lost. How much knowledge do you have about your rights as an airline passenger?” (n=4,008 – weighted)

Air travel terms and conditions

Regardless of the purchase method (direct from an airline or a third party platform), most Australians did not read their most recent flight's terms and conditions prior to purchase (57% and 54%).

Australians were more likely to read the third party platform's terms and conditions in full (8%) compared to reading terms and conditions when purchasing from an airline (3%).

We tested people's understanding of their rights via a short quiz.

Respondents' understanding of their rights was mostly correct, however, areas of uncertainty were most prominent in:

baggage complaints

3 out of 5 people (62%) incorrectly thought airports were responsible for the management of baggage and handling complaints. This is the airlines' responsibility.

denying of boarding

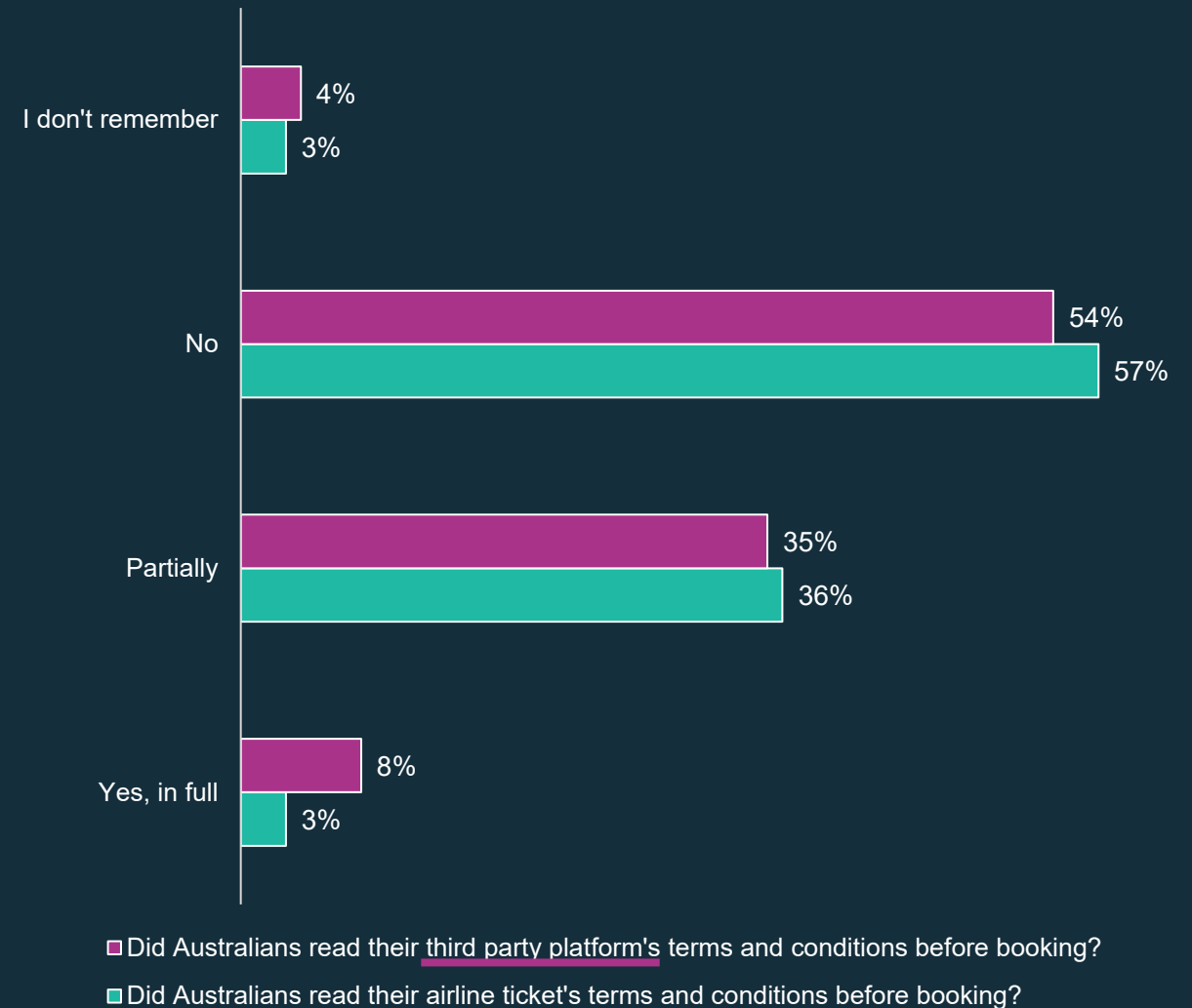
2 out of 5 (38%) could not definitely answer whether airlines could deny boarding due to recent surgery or injury

entitlements when experiencing a significant delay of 3 hours or more

Almost 2 out of 5 (35%) could not definitely answer what their entitlements were in this situation.

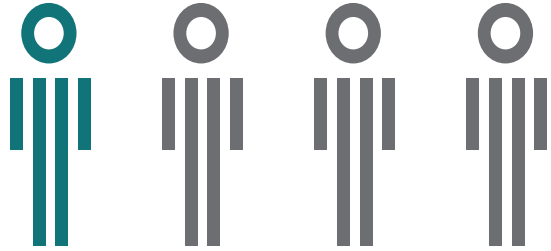
"Please select whether you think the following statements are true or false..." (n=4,008 – weighted)

Australians' reading behaviour with terms and conditions related to air travel



"Did you read the [relevant airline] terms and conditions for your ticket before booking your most recent flight from [departure airport]?" (n=4,008 – weighted); "You mentioned for your most recent flight you purchased tickets through a [relevant purchase platform]. Did you read the platform's terms and conditions for your ticket before booking your most recent flight from [departure airport]?" (n=1,016 – weighted)

Disability demographics



1/4 people (24%)

who flew in the last 12 months identified as having a disability, medical condition or injury.

“Do you have a disability, health condition or injury that has lasted, or is likely to last, 6 months or more?”
(n=4,008 – weighted)



40% said their disability, medical condition or injury impacted their ability **to access or use airports** to a mild (28%), moderate (10%) or severe degree (2%).



38% said their disability, medical condition or injury impacted their ability **to travel on an aircraft** to a mild (28%), moderate (9%) or severe degree (1%).

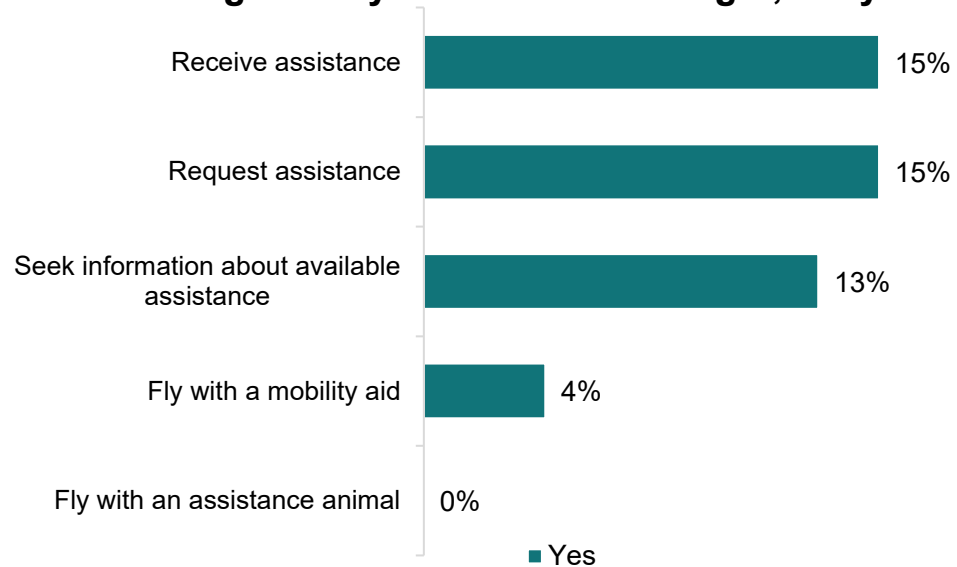
“How much does your disability, medical condition or injury impact your ability to access or use airports?” (n=1,028 – weighted); “How much does your disability, medical condition or injury impact your ability to travel on an aircraft?” (n=1,028 – weighted)

Knowledge of assistance services

Respondents with a disability, health condition or injury were asked about their knowledge of assistance services available when travelling by air.

Only 1 in 5 people (20%) with a disability, health condition or injury indicated they have a moderate-to-high level of knowledge about the assistance available to them.

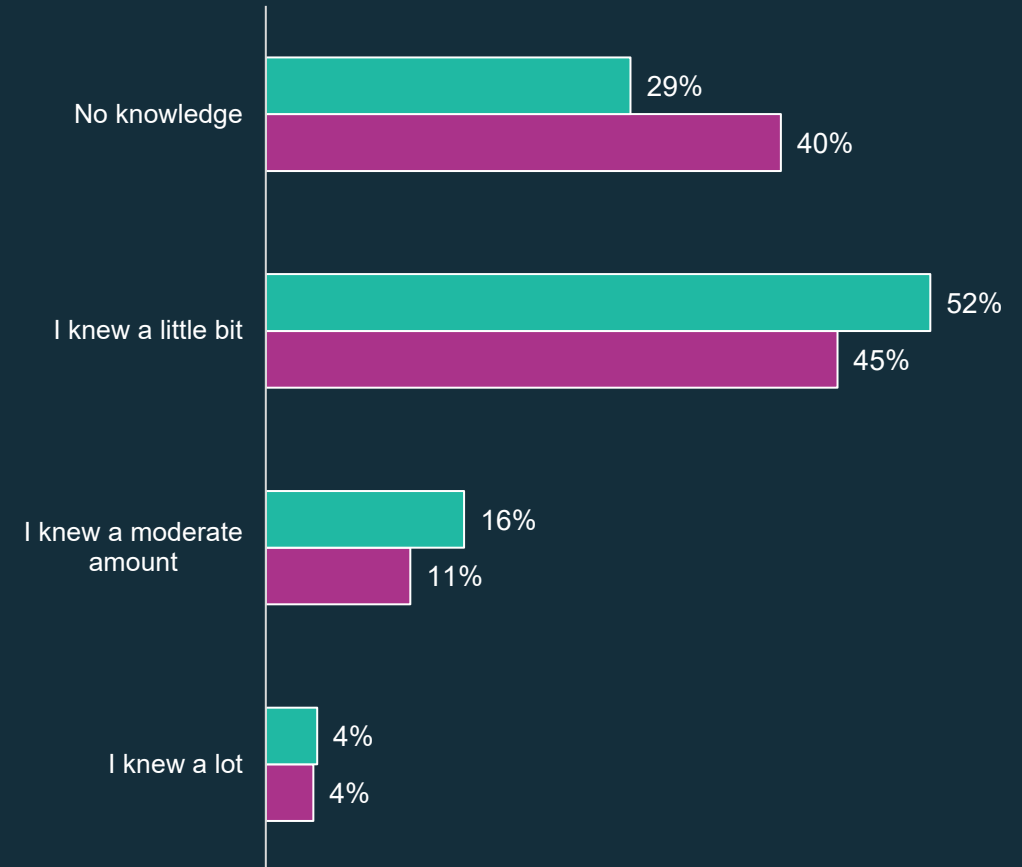
“Thinking about your most recent flight, did you:”



“Thinking about your most recent flight, did you: seek information about available assistance; request assistance; receive assistance; fly with a mobility aid (e.g. your own powered or manual wheelchair, walker); fly with an assistance animal” (n=1,027 – weighted)

Before booking your most recent flight, how much did you know about:

■ The assistance available to you ■ How to access assistance services



“Airports and airlines have assistance services available to support passengers with specific needs, to help them navigate the airport and aircraft safely and comfortably. before booking your most recent flight...how much did you know about: the assistance available to you; how to access assistance services (n=1,027 – weighted)