

# IATA Environment Survey 2022



# Background

Between November 4<sup>th</sup> to 11<sup>th</sup> 2022, IATA fielded a survey of 4,700 recent (in the last 12 months) airline travelers in the countries below with an even split of business and leisure airline travelers:

- Australia
  - Canada
  - Chile
  - France
  - Germany
  - India
  - Japan
  - Singapore
  - UAE
  - UK
  - USA
- This study is the ninth wave of research focused on the aviation industry since 2020. Each wave has had the same sample design and countries.
  - The focus of the survey has evolved with each wave as issues surrounding the economy and COVID-19 change. This wave looks to further explore passengers' views on carbon emissions, tax to mitigate the environmental impact of flying and gender diversity in the airline industry.
  - The survey was conducted by Motif, a full service research agency with experience working with a variety of international and domestic brands.

# Approach

In presenting the results of this passenger survey that focuses on the environment, we sought to answer the following five questions:

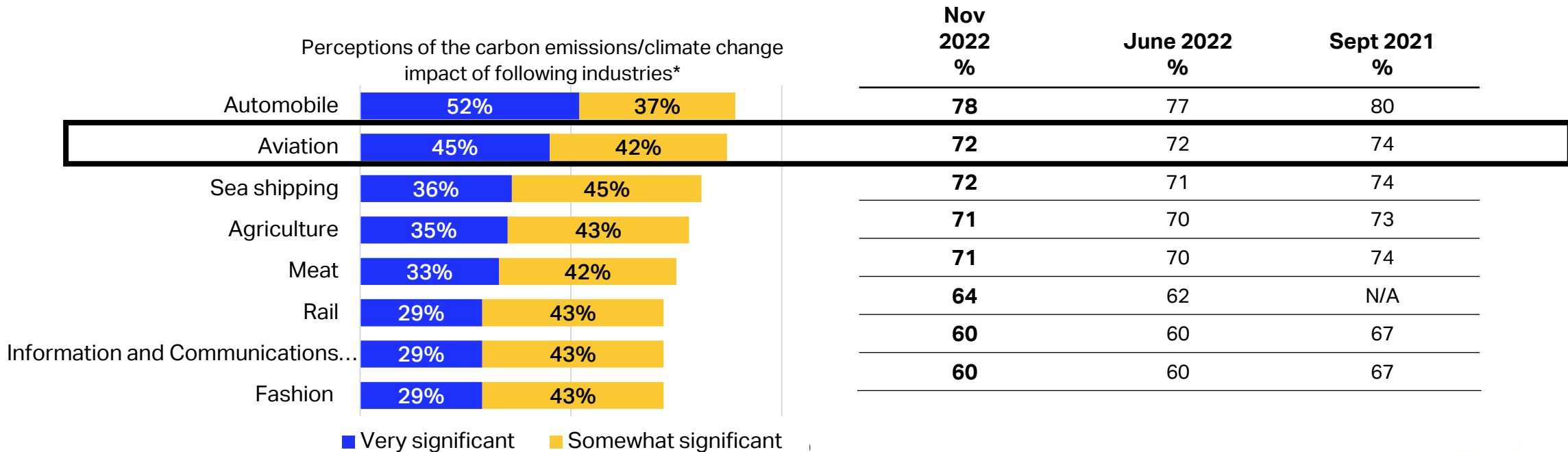
1. What is the level of understanding of the role of industries in climate change & of Net Zero commitments?
2. How is aviation perceived & how important is tackling climate change and reducing emissions for travelers?
3. What is the level of awareness of the sector's technical solutions & attitudes vis-à-vis taxation?
4. What about carbon emission transparency?
5. Beyond carbon, are other sustainability aspects also important to travelers?

What is the level of understanding  
of the role of industries in climate  
change & of Net Zero commitments?

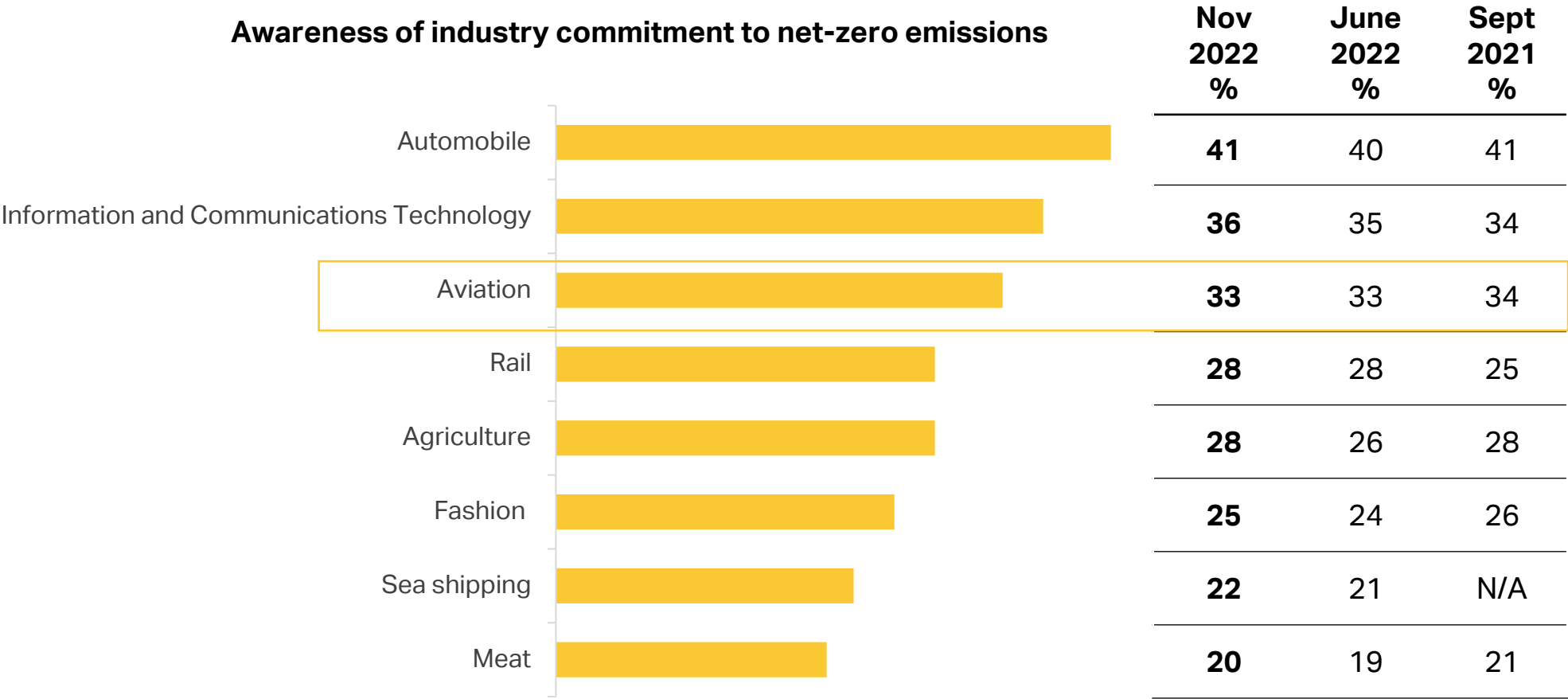
# Pax awareness of industry's footprint

All industries are seen as significant contributors to climate change. Aviation is seen as one of the major contributors, second only to the automotive industry – these findings are consistent over time.

Overall, no industry has managed to improve on perceptions of how proactive or innovative they are in reducing climate change, suggesting that expectations across the board have progressed from travelers



A third of travelers are aware of the aviation industries commitment to net-zero emissions, similar to previous waves



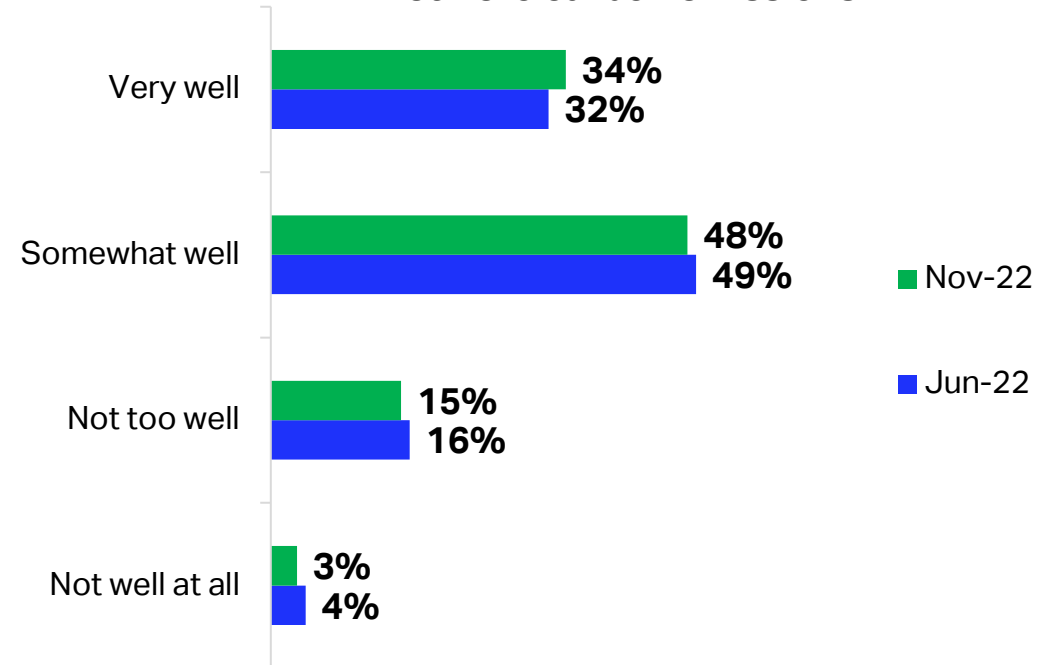
Q38. To the best of your knowledge, which of these industries have committed to net-zero emissions? Please select all that apply

# Understanding Net Zero

A third of air travelers are aware of the aviation industry's commitment to net-zero:

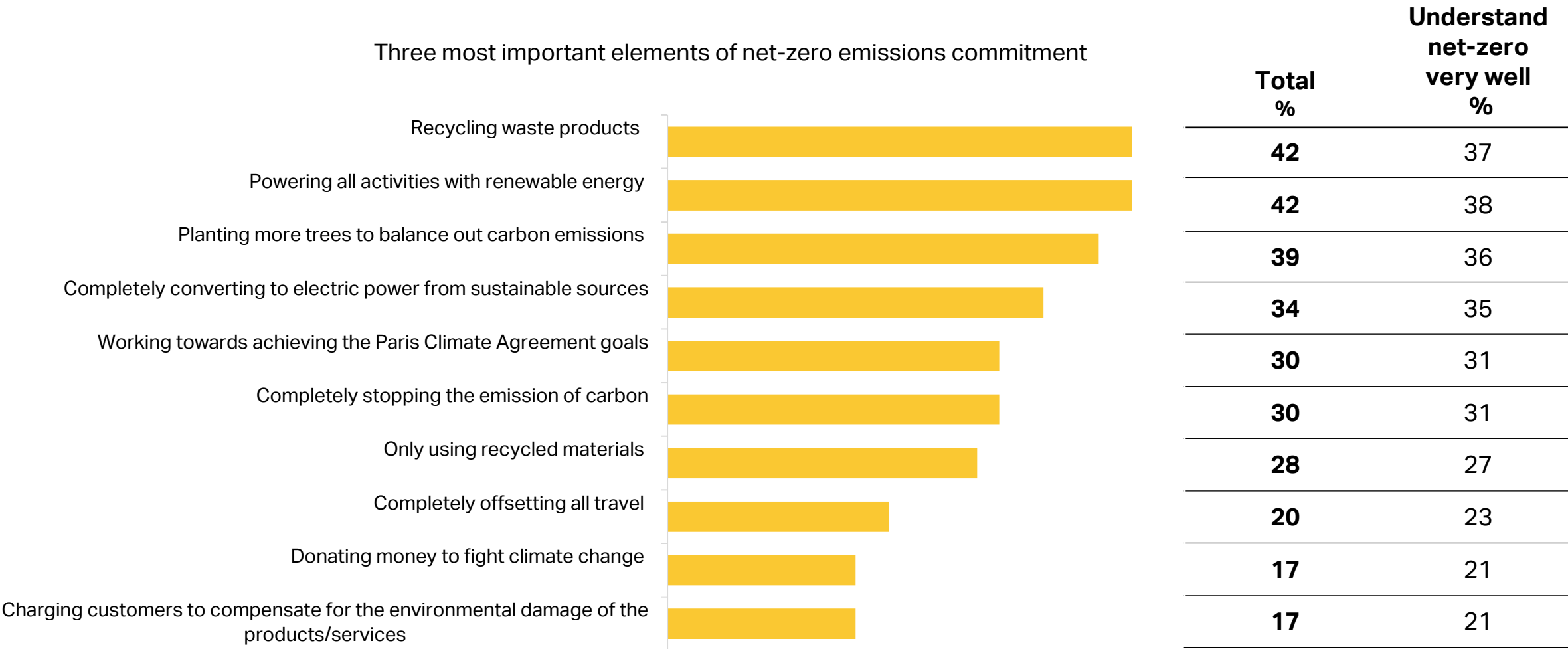
- Most (84%) think that net-zero is the right goal for the industry
- There is some scepticism about the efficacy of net-zero – some think it is green washing, others believe it is not achievable.

**How well passengers understand what it means to achieve net-zero carbon emissions**



# Recycling waste products, powering activities with renewable energy and planting more trees are seen as the most important elements

However, there does remain relatively low levels of 'importance' which points to only surface level understanding of net-zero, even amongst those claiming to understand it very well

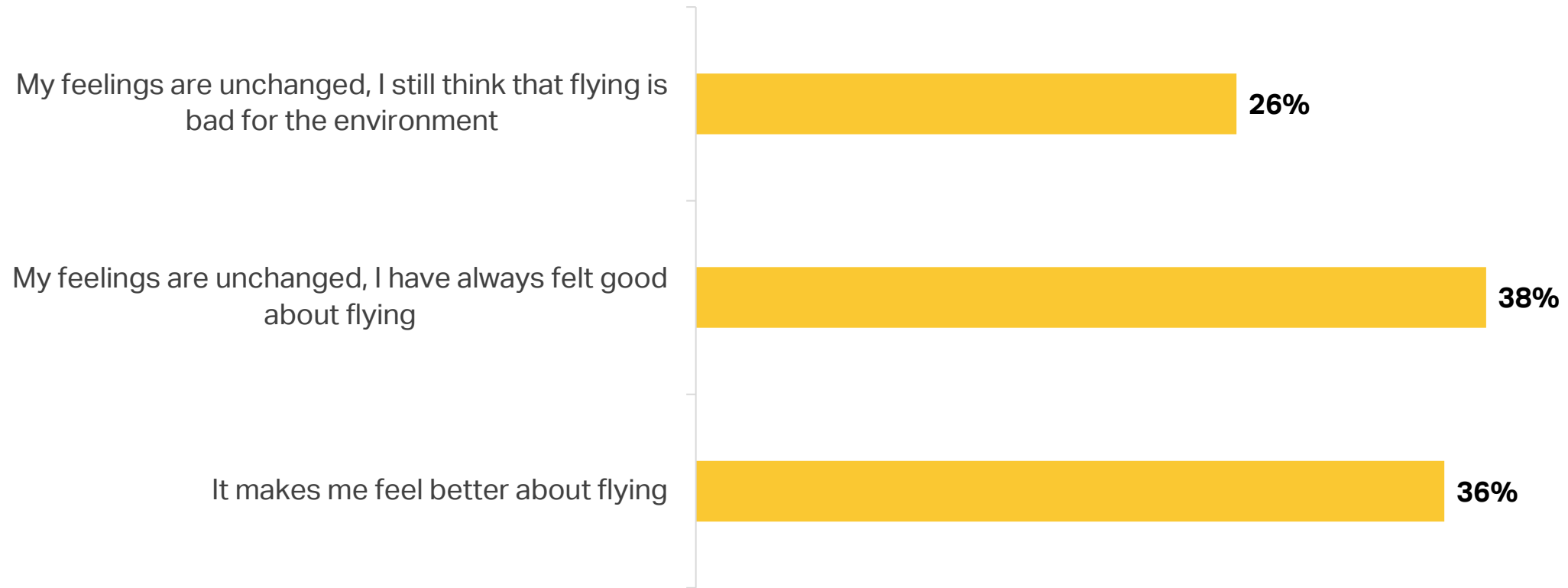


Q34 NEW QUESTION WORDING FOR NOVEMBER 22. What do you think are the most important elements of achieving net zero emissions for any company wishing to neutralize its impact on climate change?  
Q33. How well do you understand what it means to achieve net-zero carbon emissions?

## The industry's commitment to net-zero does make over a third feel better about flying

The remainder, one in five continue to be unmoved and that flying is bad for the environment

### Feelings about flying – based on airlines' commitment to achieving net zero emissions by 2050



Q38b. NEW WORDING FOR NOVEMBER 2022. And still thinking about the airlines' commitment to achieve net zero emissions by 2050, what statement best describes your feeling about flying?

How is aviation perceived & how important is tackling climate change and reducing emissions for travelers?

# Aviation is valued by business...

A survey of 500 European business leaders (October 2022) confirmed the critical nature of air transport to their business success:

- 89%** believed that being close to an airport with global connections gives them a competitive advantage
- 84%** could not imagine doing business without access to air transport networks
- 82%** thought their business could not survive without connectivity to global supply chains via air transport
- 61%** of business leaders surveyed rely on aviation for global connectivity—either exclusively (35%) or in combination with intra-Europe travel (26%). The remainder (39%) primarily use intra-European networks. Reflecting this, 55% reported that their offices are purposefully located within an hour of a major hub airport.

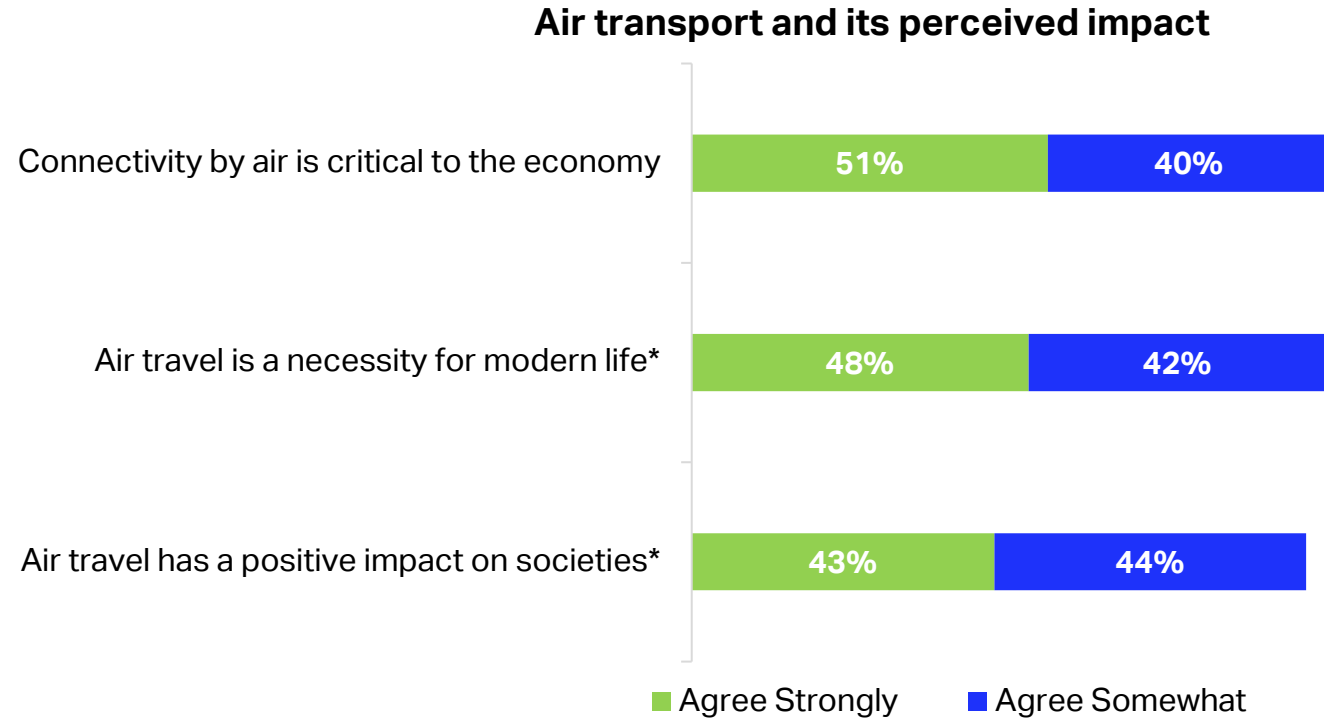
\*The European Air Connectivity Survey was fielded between October 18<sup>th</sup> – 26<sup>th</sup> to 500 business decision-makers with an even split between Germany, France, Finland, Spain and Ireland. The objective of the survey was to assess the importance of the European air transport network to business based in Europe.



# ...And by passengers

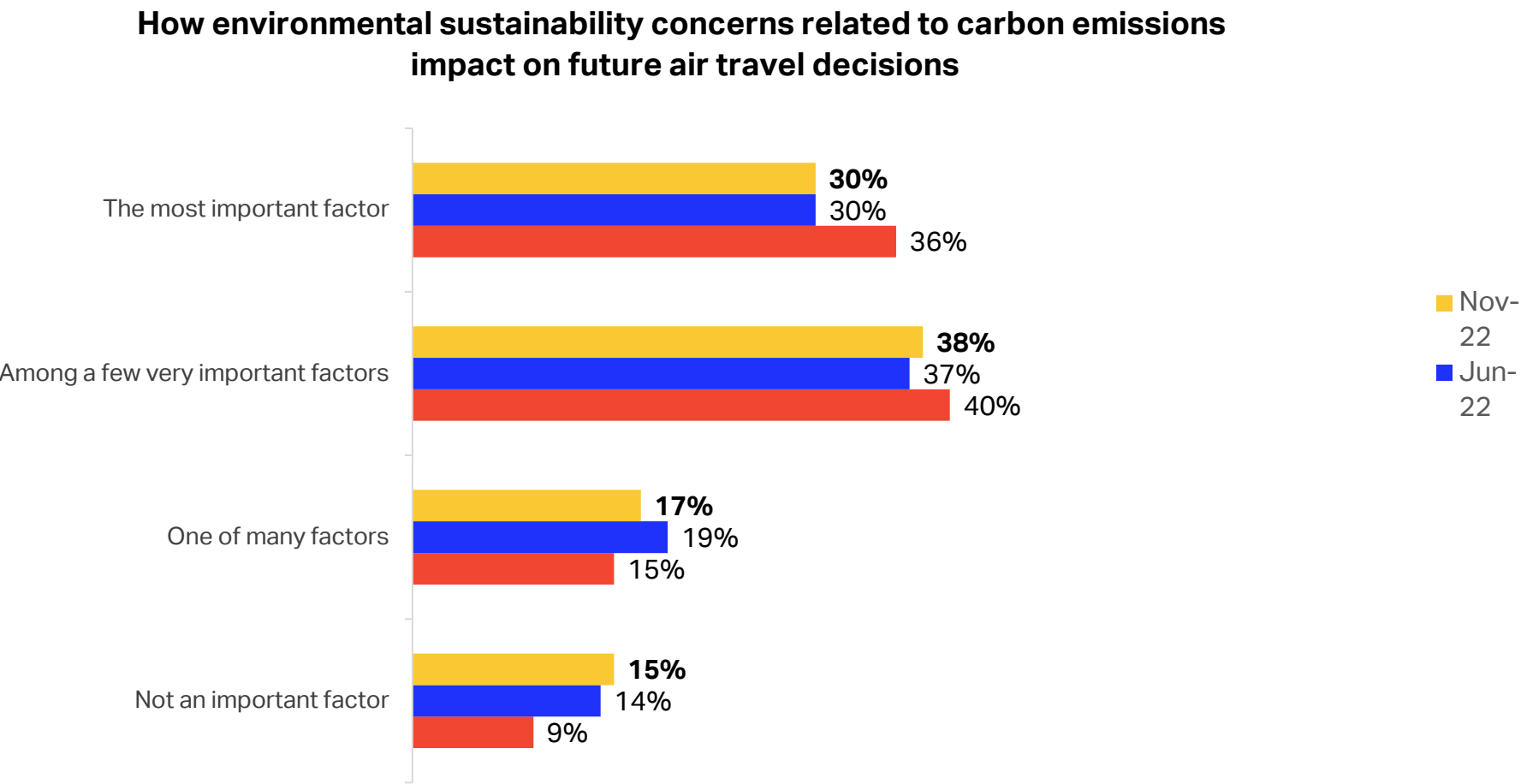
IATA's recent Passenger survey results show that:

- Over half of passengers (**57%**) are familiar with the UN's Sustainable Development Goals, and amongst these, nearly all (**91%**) agree that the global air transport network is a key contributor to these goals.
- The vast majority (**87%**) of air travelers value air transport and recognize the positive impact it has on both society and the economy:



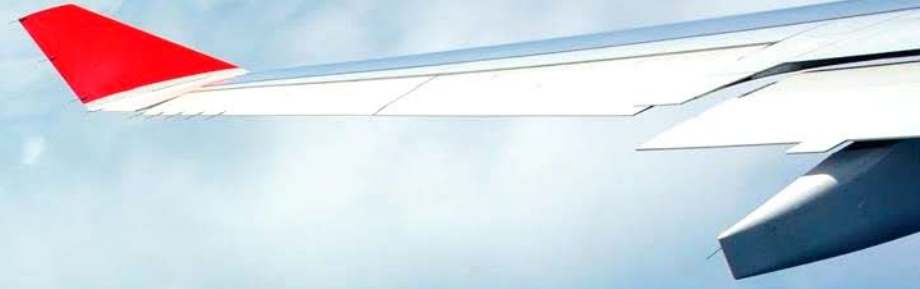
# Over two-thirds of travelers continue to be concerned with carbon emissions when traveling

Almost a third believe this to be the most important factor, unchanged from the previous wave



Q31. How much will environmental sustainability concerns related to carbon emissions factor into your future travel decisions?  
NB. Slight change in wording

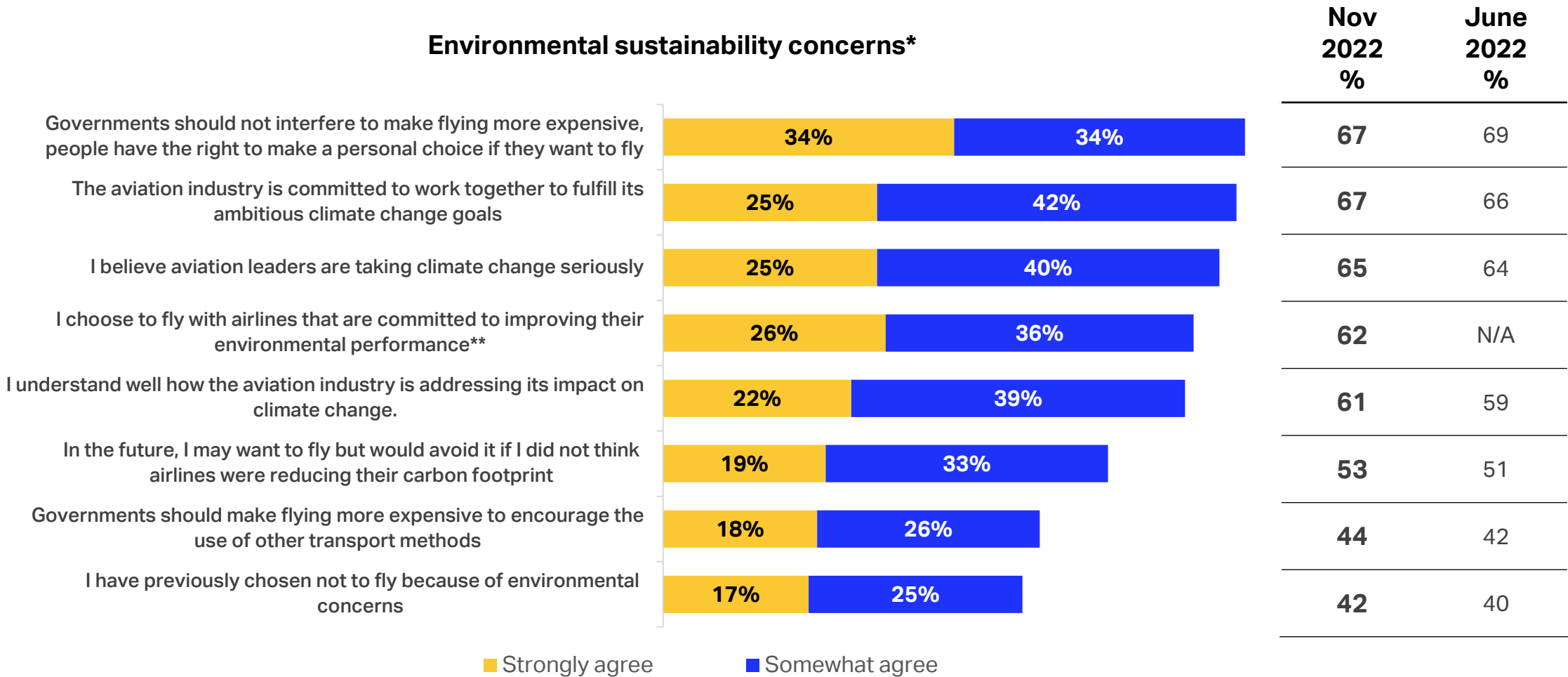
What is the level of awareness of the sector's technical solutions & attitudes vis-à-vis taxation?



# Despite being seen as a contributor to climate change, travelers believe that the aviation industry is working to address this

Whilst only 1 in 5 have previously chosen not to fly because of environmental concerns, 62% had chosen an airline that was committed to improving their environmental performance

## Environmental sustainability concerns\*



Q39. How much do you agree or disagree with the following statements – do you agree strongly, agree somewhat, neither agree nor disagree, disagree somewhat, or disagree strongly?

\*Numbers may not always add up due to rounding.

\*\* New statement for November 2022.

# Perception of industry solutions

Awareness of aviation industry measures to reduce emissions	Nov 2022 %	June 2022 %	Sept 2021 %	June 2021 %	Feb 2021 %
Designing more fuel-efficient engines	45	45	39	43	45
Flying more direct or fuel-efficient routes	38	38	34	36	38
Designing more efficient airframes to reduce fuel usage	38	37	33	35	38
Producing fuel from sustainable sources (SAF)	38	36	34	31	34
Utilizing carbon offsetting	35	34	31	31	33
Developing electrically-powered aircraft	34	30	30	27	29
Developing hydrogen-powered flight	32	30	30	26	27
Carbon capture and storage	27	27	N/A	N/A	N/A
Implementing a global carbon offsetting scheme through the United Nations	28	27	28	24	26
None of the above	7	9	8	11	11

# Increased awareness

When asked about knowledge of emission reduction measures:

- the vast majority (93%) of travelers recall at least 1 measure
- And, on average, air travelers recall 3 measures.

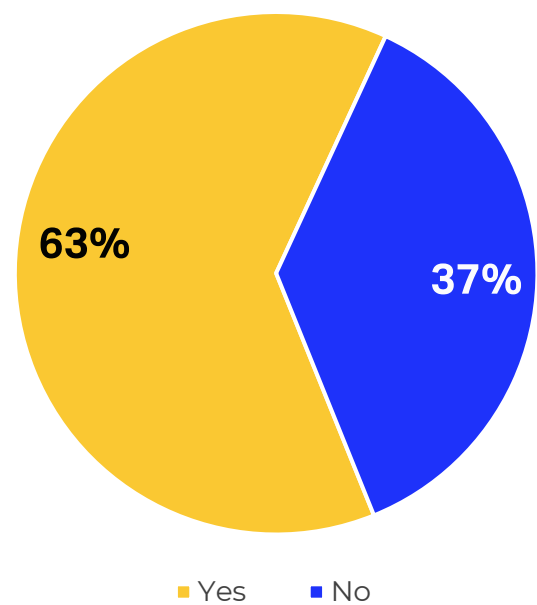
Awareness of propulsion systems has increased in all instances:

- Role of SAF +4% over 18 months
- Potential of hydrogen +5% over 18 months (+2% June-Nov 2022)
- Development of electricity-powered aircraft +5% (+4% June-Nov 2022)

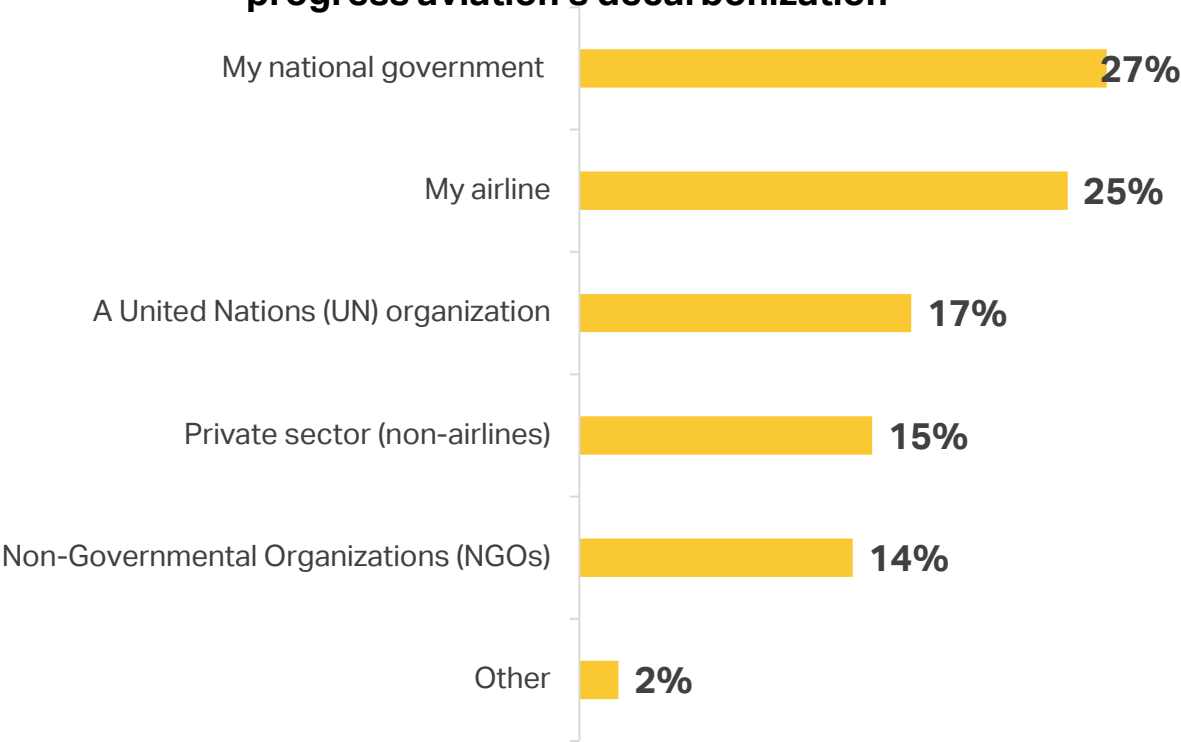
# Almost two-thirds of travelers are willing to pay extra to compensate for carbon emissions

There is no real consensus amongst travelers as to who they think would allocate funds most effectively in progressing aviation's decarbonization

Willing to pay extra to compensate for carbon emissions



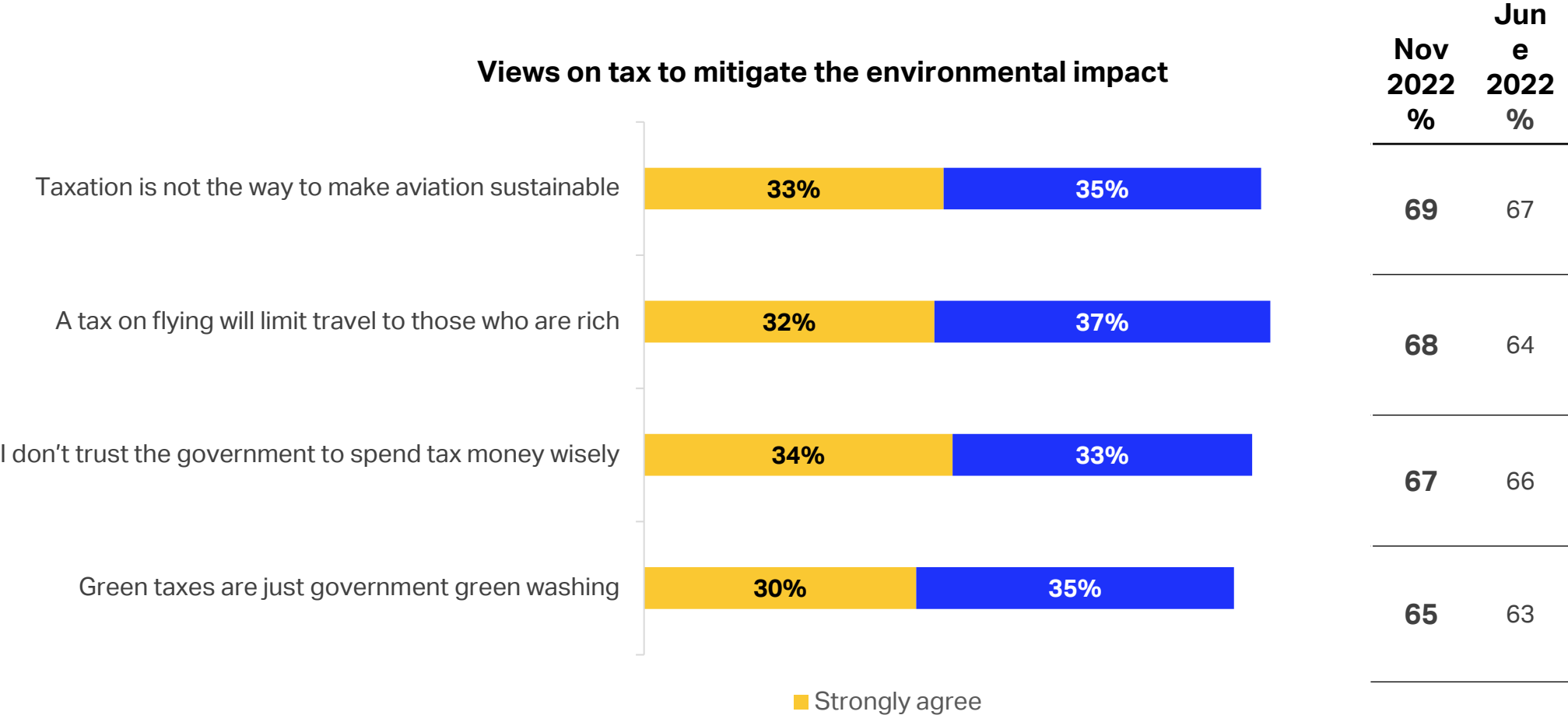
Who would allocate the funds most effectively to progress aviation's decarbonization



Q41. Would you be willing to pay extra to compensate for carbon emissions on your flight?  
Q41a. NEW QUESTION FOR NOVEMBER 2022. If fees are collected to compensate for carbon emission on flights you take, who do you think would allocate the funds most effectively to progress aviation's decarbonization?

# Over two thirds do not believe that taxation is the answer to making aviation sustainable

The majority continue to question it's effectiveness, with wide agreement that such a tax will limit traveling only to those who are rich. There is also little trust that governments will spend tax money wisely, to mitigate climate impact.



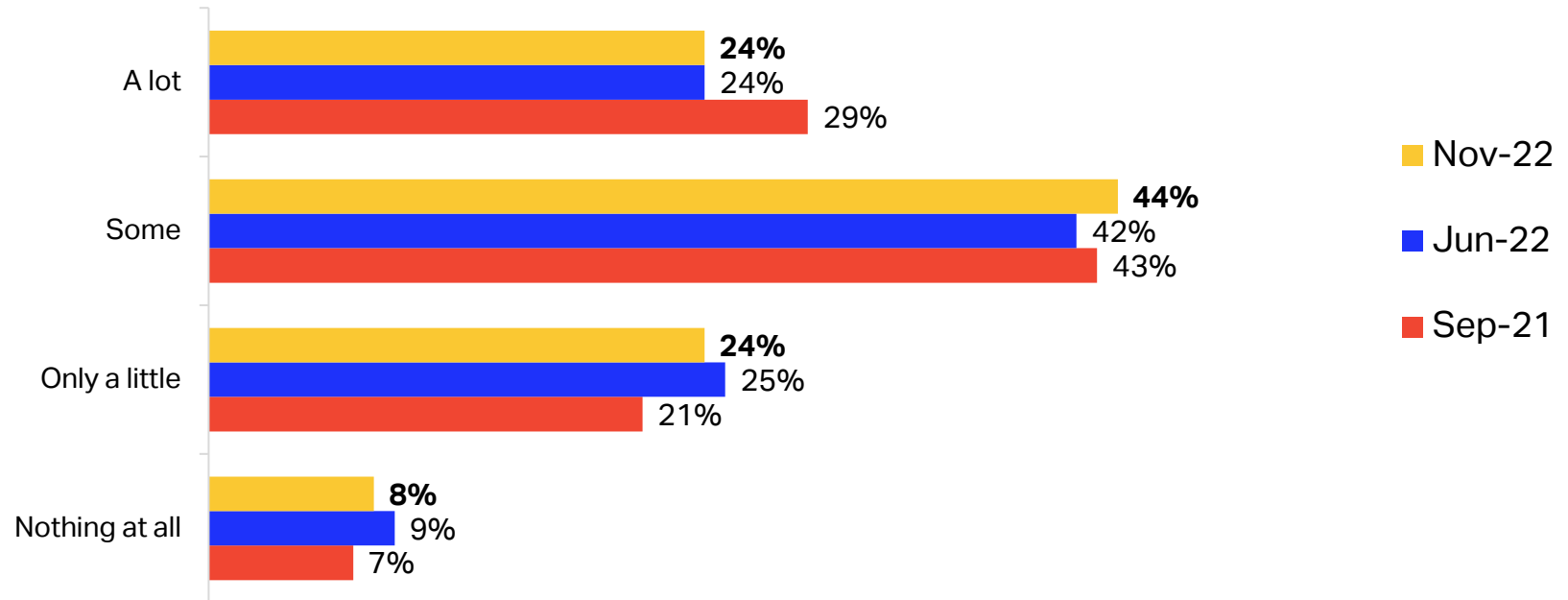
Q42a. Below, are some statements about tax to mitigate the environmental impact of flying. Do you agree strongly, agree somewhat, neither agree nor disagree, disagree somewhat, or disagree strongly?

An aerial photograph of a rural landscape. A light-colored, winding road curves through the scene. To the left of the road, there are large, rectangular fields of golden-brown color, likely mature crops like wheat or corn. To the right of the road, the fields are a vibrant green, suggesting a different crop or a different stage of growth. The road itself is a light grey or white, and it has a few small trees and bushes along its edges. The overall scene is a patchwork of different agricultural fields, creating a complex, geometric pattern.

What about carbon  
emission transparency?

# Knowledge of carbon offsetting

How much passengers know about carbon offsetting

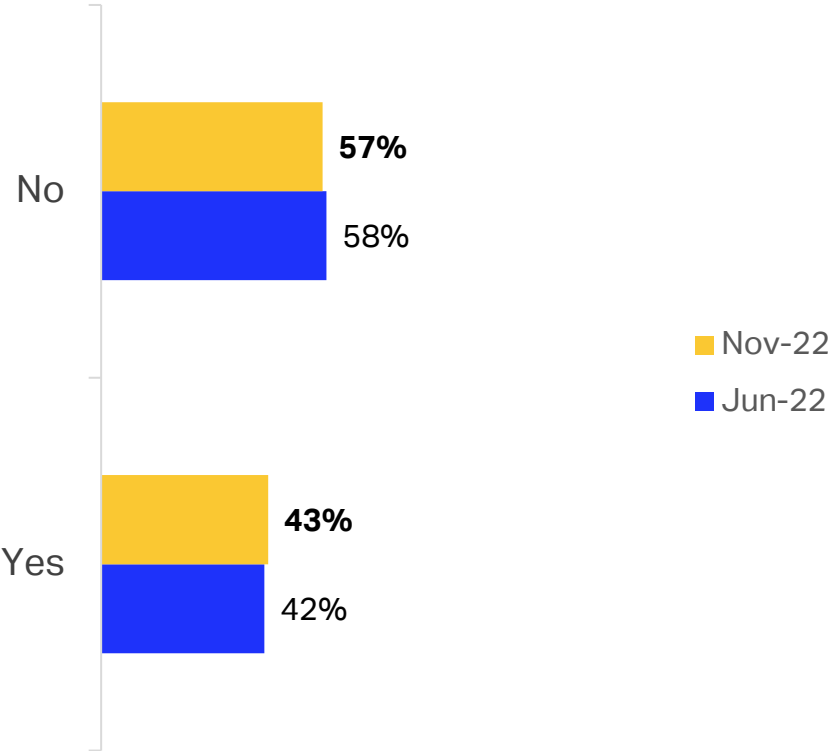


**92%** of travelers know about carbon offsetting, but levels of understanding vary. The role of carbon offsetting is not always clear to air travelers; some think it is an efficient tool, others are sceptical and question the efficacy of offsetting over carbon reduction.

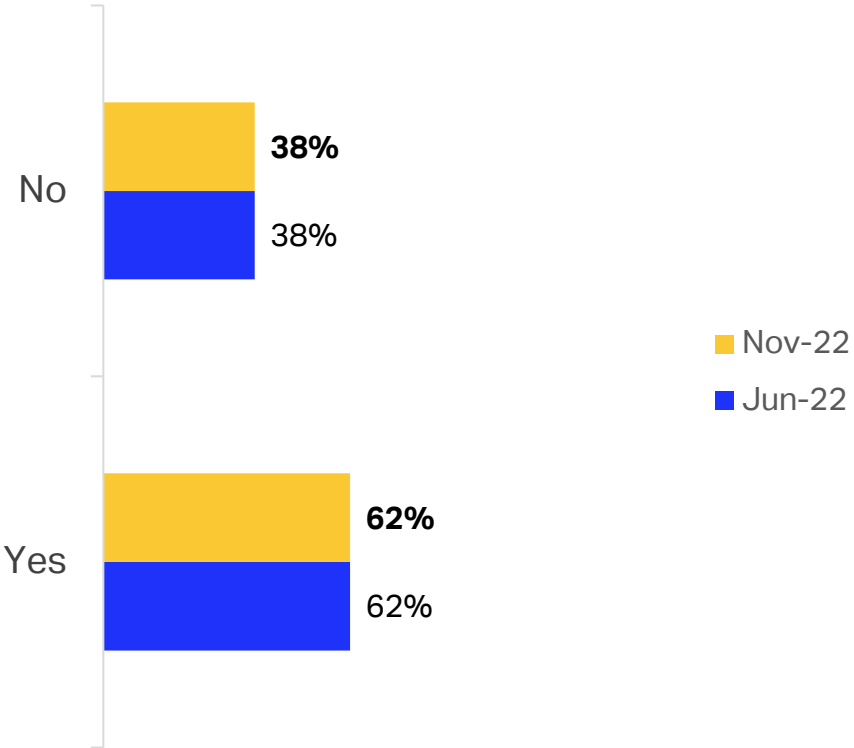
- Many are not sure how to go about offsetting. Interestingly, 81% of those that know a lot about offsetting regularly offset their air travel.
- 1/3 of those that offset also report that it was hassle & that airlines should make it more convenient.

Two-thirds of travelers intend to offset their travel in the future, similar to that observed in June 22

Have you offset any of your air travel before



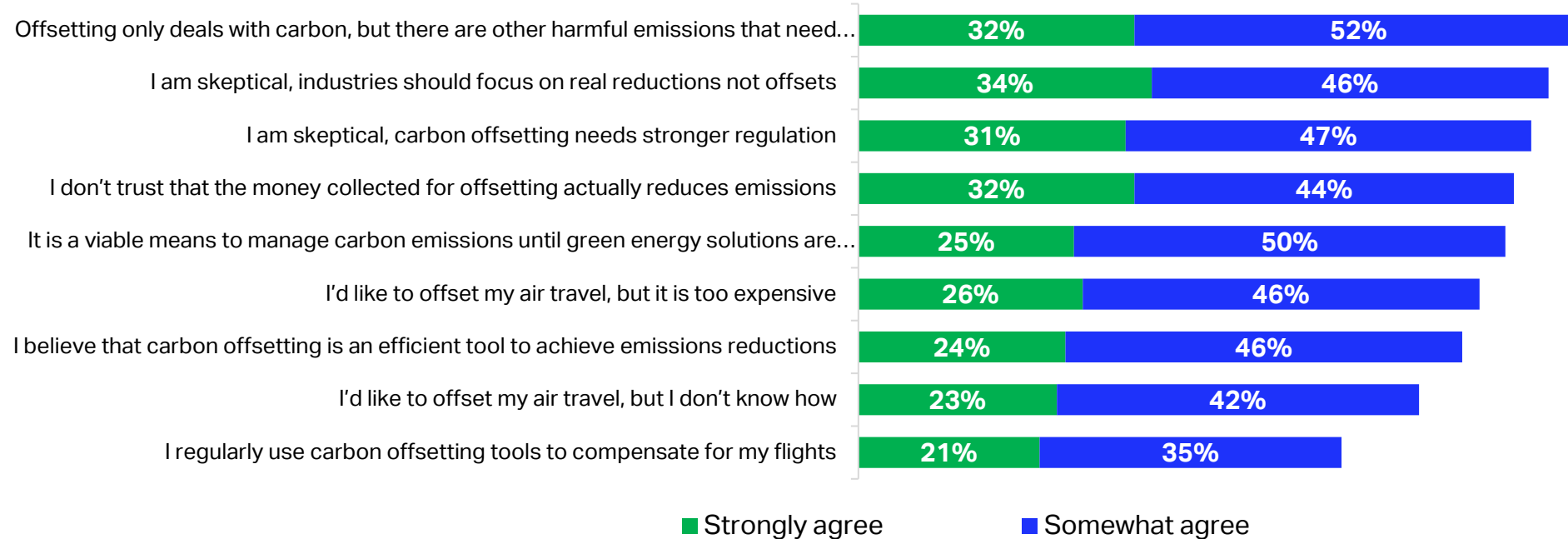
Do you intend to offset your air travel in the future



Q32b. Have you offset any of your air travel before?  
Q32c. Do you intend to offset your air travel in the future?

# Carbon offsetting as a solution

## Beliefs about carbon offsetting\*



Over 2 in 5 believe that there are more harmful emissions that need to be addressed, questioning the effectiveness of offsetting

[Air travelers want industries to focus on reductions rather than offsetting](#). Those who claim to know a lot about carbon offsetting however, are significantly more likely to do so

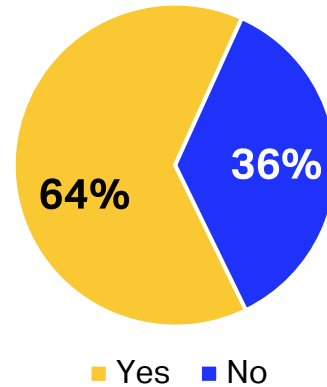
# Carbon emission calculations

Nearly two-thirds of travelers do believe they have a **responsibility** to know the carbon emissions of their flights:

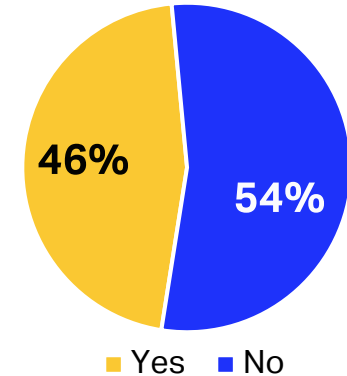
- However, less than half are aware of the resources or tools to calculate this

Almost two-thirds of travelers are willing to pay extra to compensate for carbon emissions

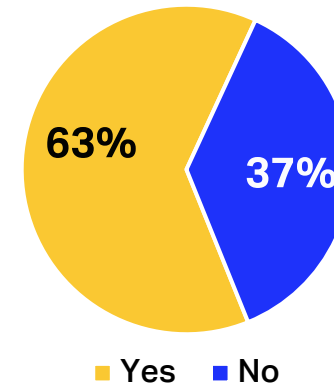
Is it the responsibility of travelers to know the carbon emissions of their flights



Are you aware of resources/tools to calculate the carbon emissions of your flight



Willing to pay extra to compensate for carbon emissions



# Conclusion

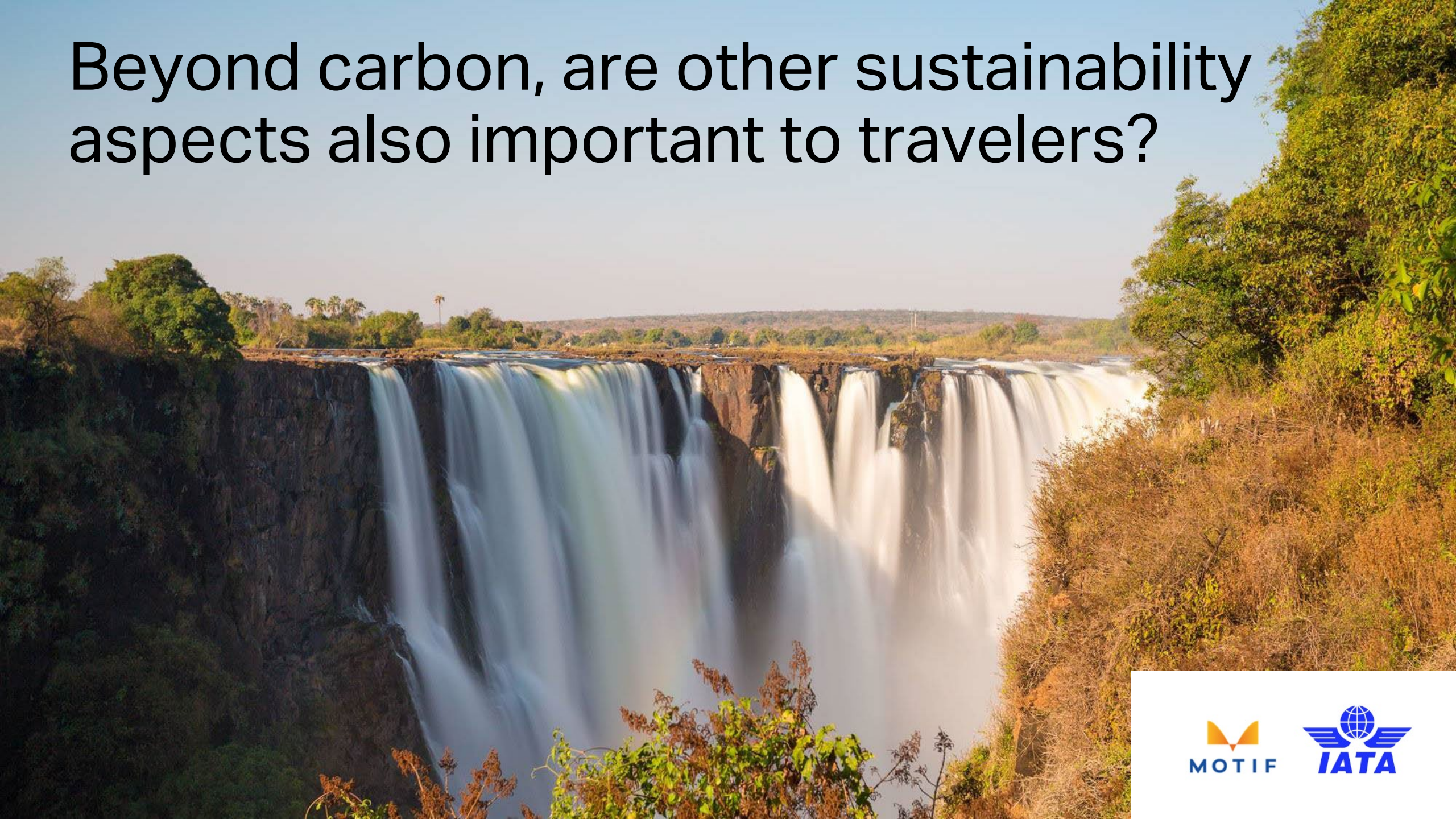


# A few thoughts to finish

IATA's latest survey highlights that

- Travelers are increasingly aware of the share of aviation's emissions
- The industry is valued by both business and passengers and sustainability/emissions are a factor in purchase decisions
- Solutions exist and understanding of their availability is also increasing, with pax preferring technical solutions over economic or demand suppression measures
- They also want a personal involvement and responsibility, with an appetite for emission clarity & easier access to information
- Sustainability isn't just about carbon, with factors around SUP and gender diversity also impacting consumer choices

# Beyond carbon, are other sustainability aspects also important to travelers?

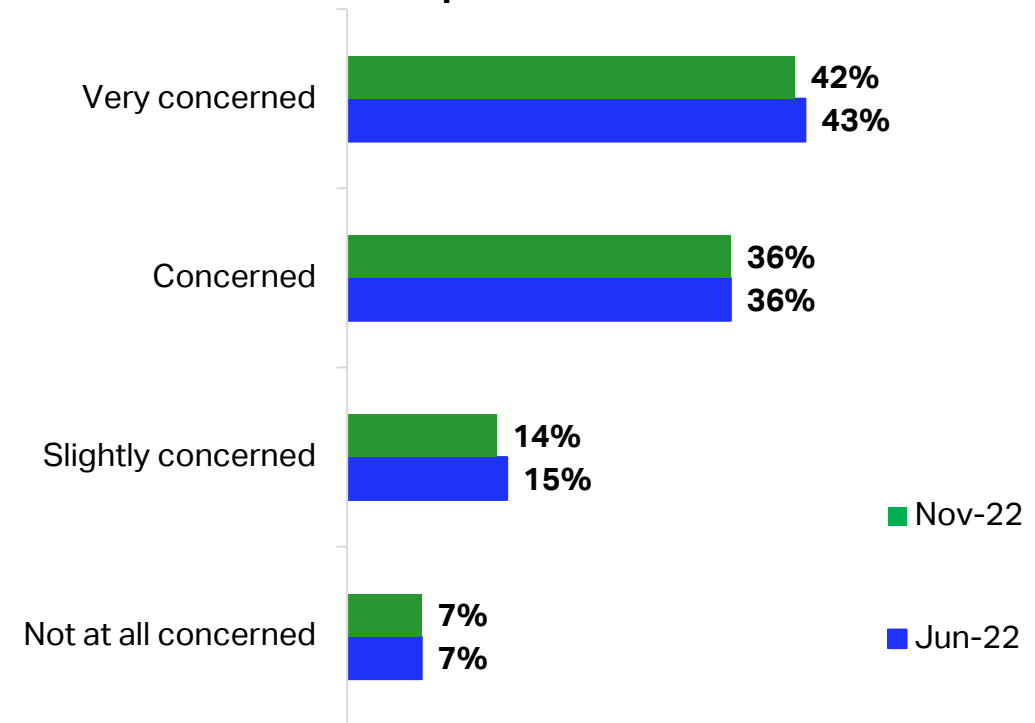


# Sustainability in the broader context

Mirroring wider concerns about the use of single-use plastics globally, most travelers are concerned (**78%**) with the use of single use plastics in airline cabins; a result that is little changed from that observed in June 2022.

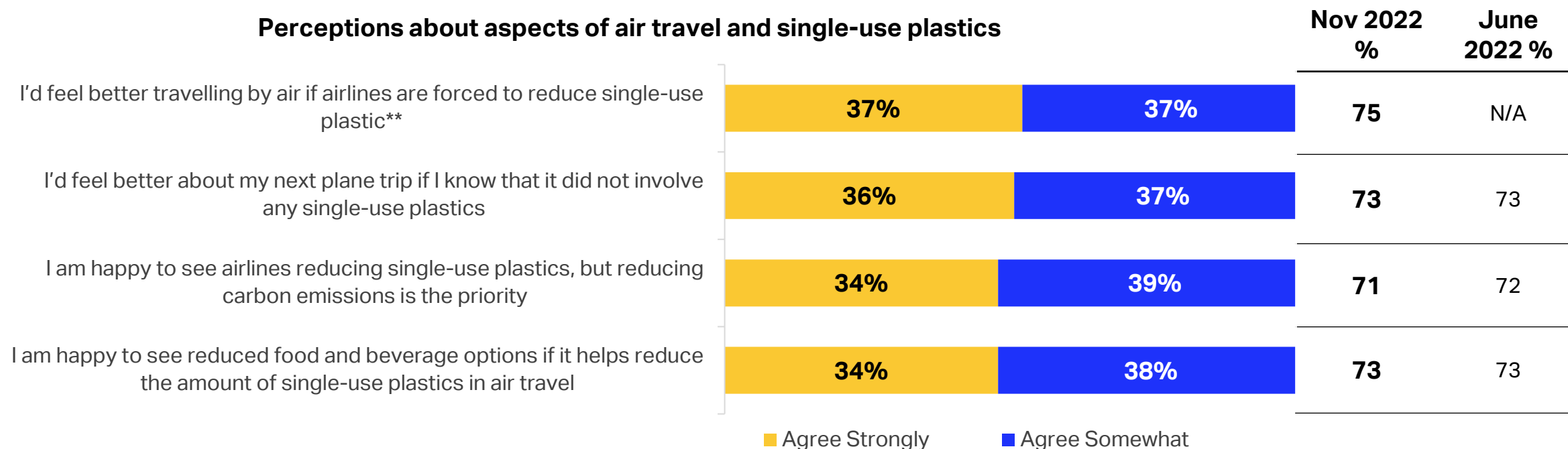
**¾ of travelers would feel better about flying if SUPs were reduced, or even removed in entirety from the cabin.** Perhaps reflecting the strength of opinion on this issue, most would be happy to see a reduction in cabin food and beverage options, in order to reduce single-use plastic usage.

Level of concern on the impact of single-use plastics in airplane cabins



## Actions to reduce single-use plastics in air cabins would be welcomed by air travelers

Nearly three-quarters would feel better about flying if it didn't involve any single-use plastics and are happy with less food and beverage options for this to be the case



Q36. Below, are a number of statements about air travel and single-use plastics. Do you agree strongly, agree somewhat, neither agree nor disagree, disagree somewhat, or disagree strongly?

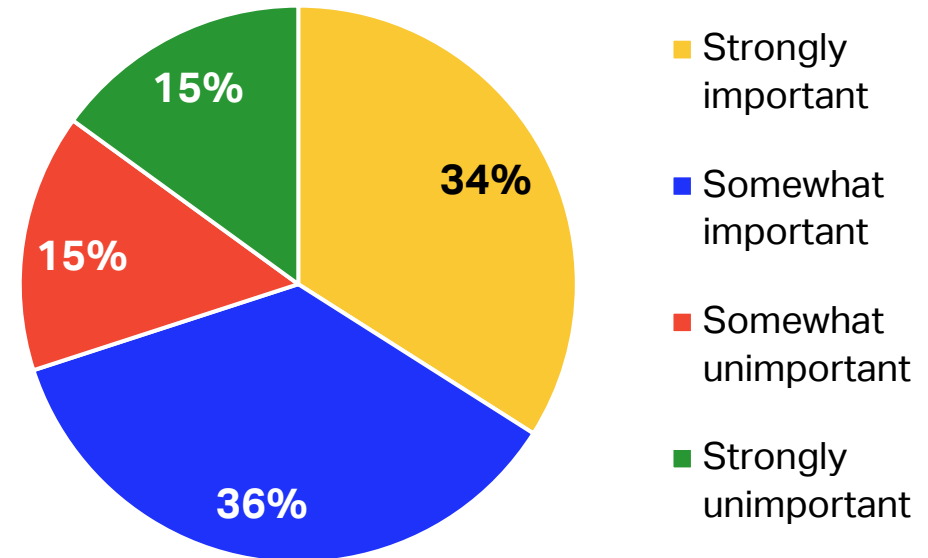
\*\* New statement for November 22

# It's not just SUP – gender diversity

**The airline industry is not seen to be a leader in gender diversity.**

Results by role further amplifies this belief with pilots and technical workers being perceived to be held predominantly by men and roles such as cabin crew or service workers being the domain of women.

**The importance of an airline's commitment to gender diversity – when choosing an airline**

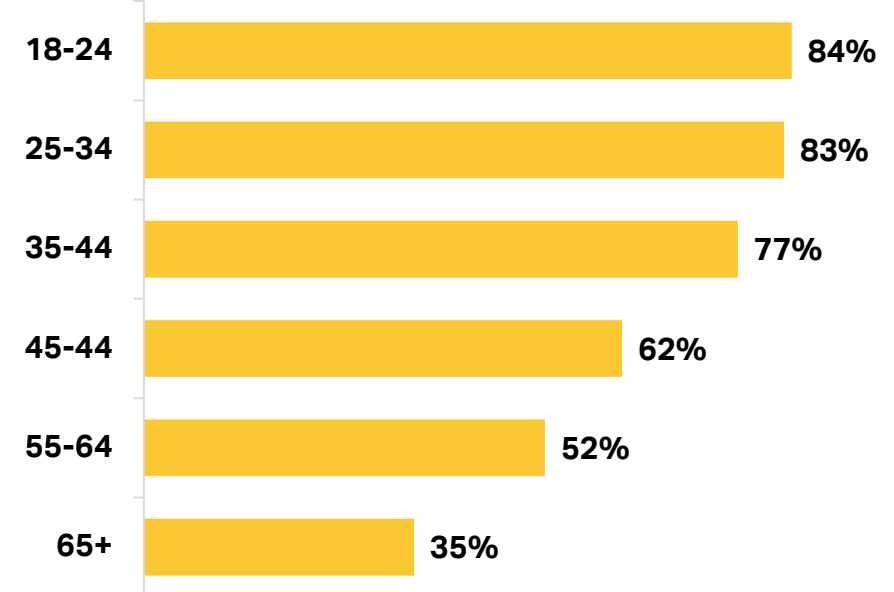


# Travelers' expectations

**Gender diversity is a key issue for the airline industry**, given that an airline's commitment to GD does impact airline choice for most passengers globally.

Further, this strongly correlates with age – the younger the traveler, the more important this is in their airline of choice.

**The importance of an airline's commitment to gender diversity – when choosing an airline (by traveler age)**



# Q&A

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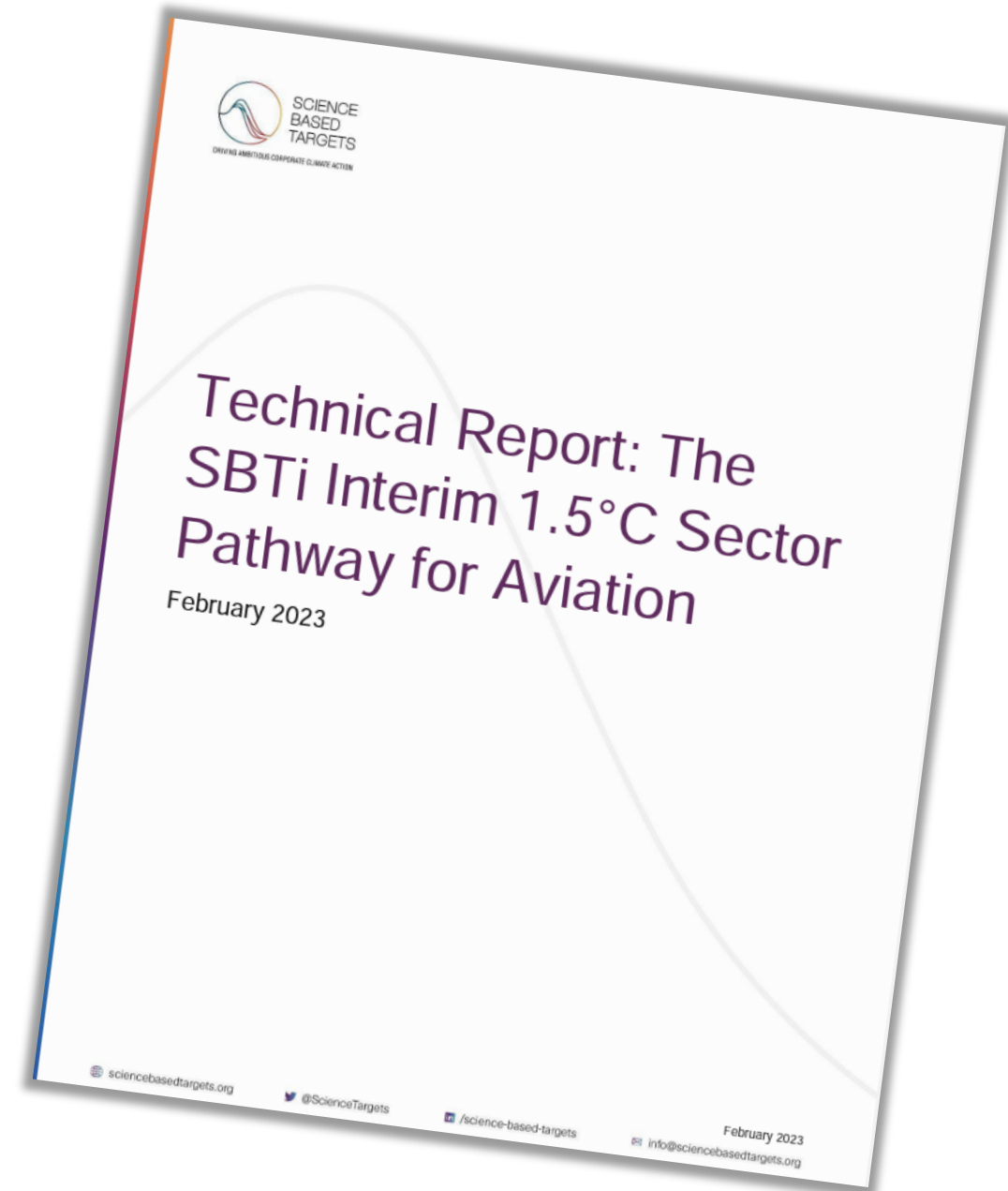




Other matters of interest

# Carbon pathways and metrics

- Following ATAG call in December 2022
- SBTi has released an interim 1.5°C pathway in the last couple of days
- A consultation will take place, timing tbc



## EU Green Taxonomy discussions

- Aviation out of Green Taxonomy.... then back in...
  - Controversy over nuclear and gas caused reluctance in Commission
- Letter from aviation industry partners to Commission as well as discussions with member states helped ensure aviation is definitely going to be included... for now
- Negotiations between DGs in the Commission.
  - DG Climate Action has been working to remove aviation and will try and restrict further
- Public consultation expected, timing tbc

ENERGY & ENVIRONMENT JANUARY 31, 2023 / 2:14 PM / UPDATED 8 DAYS AGO

### After energy spat, EU faces row over green rules for aviation

By Kate Abnett, Joanna Plucinska, Tim Hepher

5 MIN READ



# French 'green' advertising regulations

- New regulation impacting advertising in France
- Understand there are similar provisions in other jurisdictions – either law or advertising standards authority
- Have any aviation businesses been particularly impacted so far?
- What is the definition being used for 'advertising' in France and could this impact internet 'advertising' from outside France?

## ENVIRONMENT

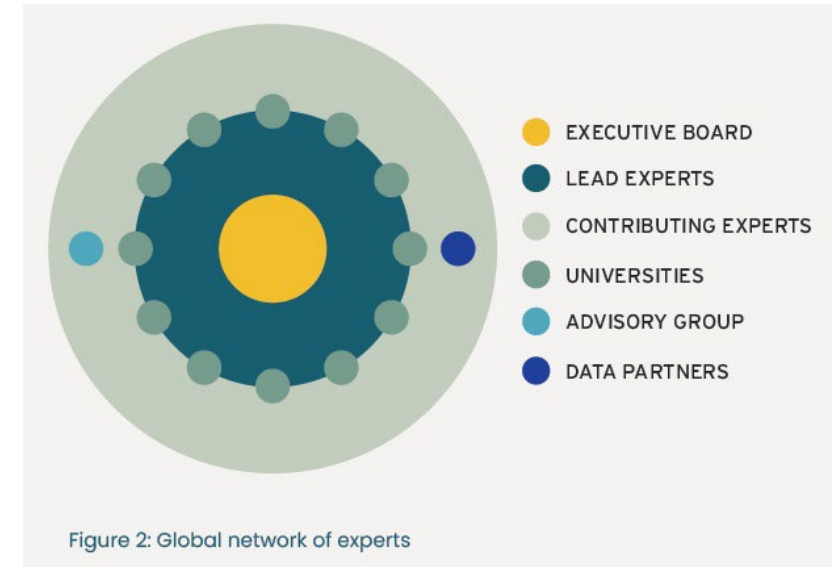
### France tightens ad rules to take aim at 'greenwashing'

New advertising rules in France will make it more difficult for firms to claim that their products and services are "carbon neutral", as experts push for stronger international regulation to tackle company greenwashing.

Published: 6 January 2023 09:03 CET

## Tourism Panel on Climate Change

- Launched at COP/27.
  - Funded with assistance from Saudi Arabia.
  - Will aim to replicate the IPCC model: with a focus on climate science related to tourism.
  - Driven by Geoffrey Lipman.
  - 30 Lead Experts, 33 Contributing Experts.
- 
- First 'horizon paper' is on aviation – penned by Chris Lyle.
  - Is planning a 'science assessment' in 2024.





# PATH TO NET ZERO

7

Next steps

# Next steps

- PowerPoint will be sent after this call, with links
- These calls are for industry only, if you would like to invite colleagues, please have them register at the link provided

Upcoming events		
28 Feb	<b>Sustainable Aviation Futures Middle East</b>	Dubai
8-10 Feb	<b>Airspace World</b> Sustainability Stage	Geneva
21 Mar	<b>ATAG Path to Net Zero #2</b>	Virtual
17-18 Apr	<b>Sustainable Skies Summit</b>	London