

# **Global Views on Air Travel and Its Environmental Impact**

Consideration of lower carbon-footprint alternatives Trust in airlines' commitment and ability to reduce their impact on the environment

An Ipsos Survey for the World Economic Forum, August 2019

### Global Views on Air Travel and Its Environmental Impact

### Key Findings

- One in seven global consumers (14%) would use a form of transportation with a lower carbon footprint than air travel *even* if it were less convenient or more expensive. Twice as many (29%) would do so if it were as convenient or no more expensive than flying.
- The global public is divided into three groups of similar sizes when it comes to trusting both the commitment and the ability of airlines to reduce their environmental impact: roughly 1/3 are fairly or very confident in them, 1/3 have little or no confidence in them, and 1/3 sit in the middle.
- Frequent flyers are much more likely than less frequent ones to trust airlines' commitment and ability to reduce their impact on the environment (about 3 in 5 do), but also to consider alternative forms of travel with a lower carbon footprint.



# Choosing a Form of Transportation with a Lower Carbon Footprint

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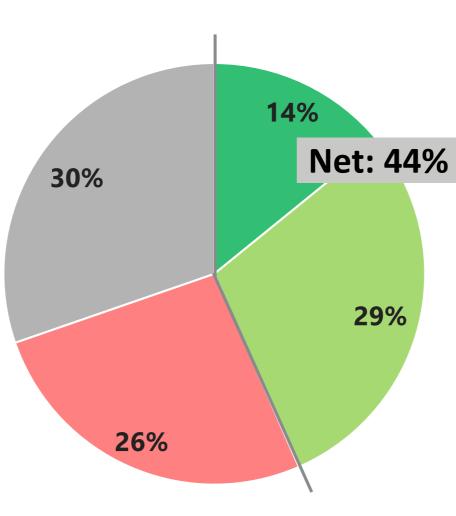
One in seven global consumers (14%) would use a form of transportation with a lower carbon footprint than air travel *even* if it were less convenient or more expensive.

Another two in seven (29%) would do so if it were as convenient or no more expensive than flying.

Combined, they make up 44% of all global consumers.



### **Globally among all adults**



I would use a form of transportation with a lower carbon footprint than an airplane (e.g., rail) even if it were less convenient or more expensive than flying

I would use a form of transportation with a lower carbon footprint than an airplane (e.g., rail) only if it were as convenient and no more expensive as flying

I would not choose a form of transportation based on its carbon footprint

Not sure



Those who fly frequently (5 times per year or more often) are the most willing to use a lower carbon footprint means of travel, even if it is more costly or less convenient: 23% of them would do so vs. 17% of moderate flyers (1-4 times per year) and 12% of infrequent or never-flyers (less than once per year or never).



**Choosing a Form of Transportation with a Lower Carbon Footprint** 

**Frequent flyers** 

**Moderate flyers** 

(5+ times per year)

(1-4 times per year)

Net: 61%

Net: 51%

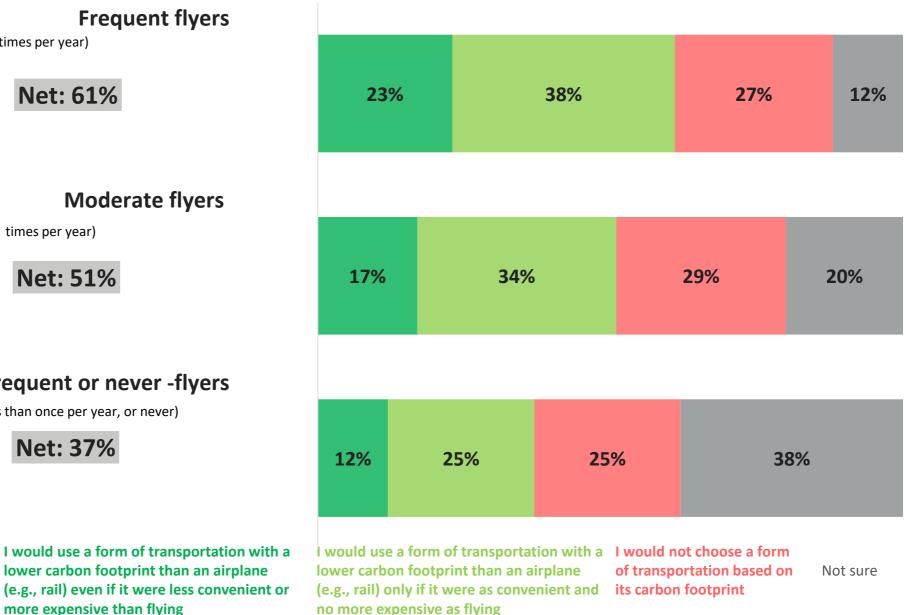
**Infrequent or never -flyers** 

more expensive than flying

(less than once per year, or never)

Net: 37%

### **Globally by flying frequency**

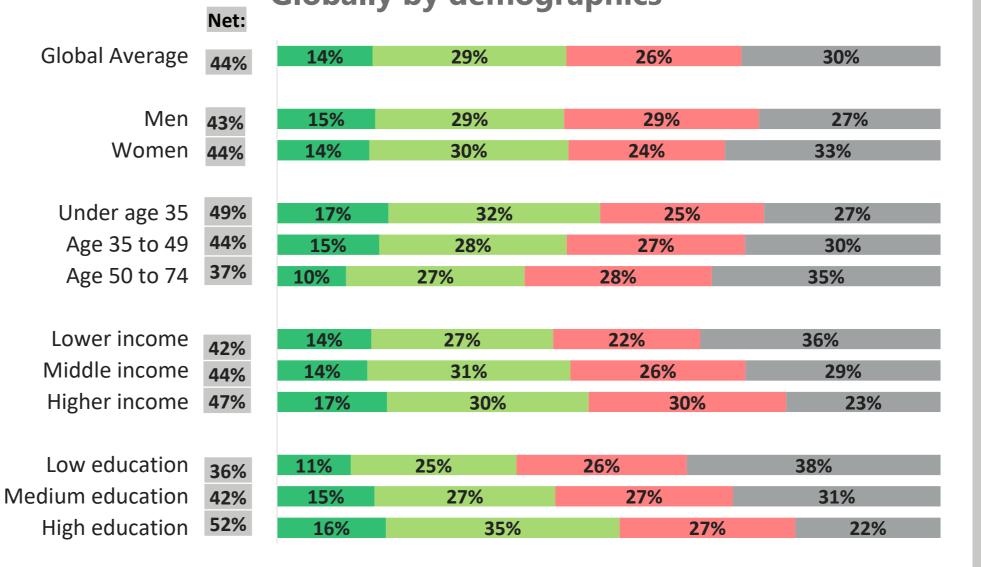


Base: 19,023 online adults under the age of 75 across 27 countries, including 1,537 frequent flyers, 6,822 moderate flyers and 10,664 infrequent/never-flyers

Globally, willingness to use lower carbon-footprint alternatives to air travel is slightly higher among younger and better educated consumers.



### Choosing a Form of Transportation with a Lower Carbon Footprint Globally by demographics



I would use a form of transportation with a lower carbon footprint than an airplane (e.g., rail) even if it were less convenient or more expensive than flying

I would use a form of transportation with a lower carbon footprint than an airplane (e.g., rail) only if it were as convenient and no more expensive as flying I would not choose a form of transportation based on its carbon footprint

Not sure

Interest in using travel modes with a lower carbon footprint than airplanes varies widely across countries.

In China, nearly 38% would do so even if it were less convenient or more expensive, compared to just 7% in Canada and 4% in Japan.



#### **Choosing a Form of Transportation with a Lower Carbon Footprint** By country Net:

Global Average	44%	14%		29%	, )		26%			30%	
South Korea	60%	12%		48%			17%		24%		
India	60%	23%			37%			17%		24%	
Peru	55%	19%			36%			15%		30%	
Saudi Arabia	55%	25%			30		22%			23%	0
China	53%		38	%		15%		31%			16%
Sweden	52%	13%			39%			27%		21	%
South Africa	51%	11%	11%		40%		24%			25%	
Malaysia	49%	16%			33%		26%			26%	
Chile	48%	16%		32%			21%			31%	
Belgium	47%	15%		32%			24%		28%		
Great Britain	46%	13%		33%			31%			22%	
Turkey	46%	17%		28%			21%			33%	
Mexico	45%	17%		29%			20%	20%		35%	
Germany	45%	17%		28%			299	%	26%		
Spain	44%	12%		32%			19%			36%	
Romania	44%	14%	14%		30%		19%		37%		
Argentina	42%	14%	14%				25%			33%	
Poland	41%	12%		29%			25%			34%	
Australia	40%	10%		30%			32%			28%	
Hungary	37%	13%		25%			34%			28%	
France	37%	11%		27%			28%			35%	
Brazil	34%	13%		22%		15%			51%		
United States	34%	8%	27%				35%		31%		
Italy	33%	11%	22%			23%			44%		
Canada	33%	7%	2	26%			6%			31%	
Japan	23%	4%	20%			36%			41	%	
Russia	22%	9%	13%				63%				16%

I would use a form of transportation with a lower carbon footprint than an airplane (e.g., rail) even if it were less convenient or more expensive than flying

I would use a form of transportation with a I would not choose a form lower carbon footprint than an airplane (e.g., rail) only if it were as convenient and no more expensive as flying

of transportation based on Not sure its carbon footprint

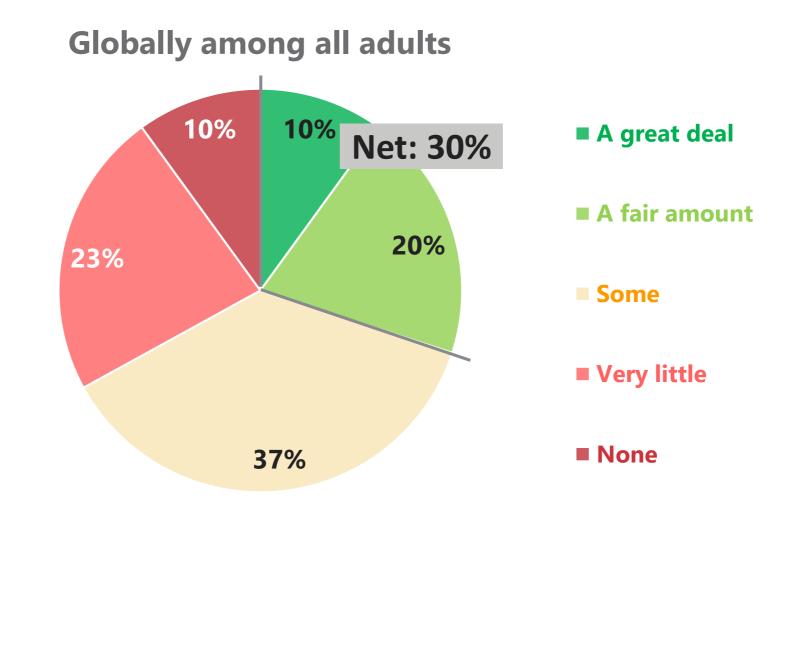
### **Trust in the Environmental Commitment of Airlines**

The commitment of commercial airlines to reduce the impact of airplanes on the environment

When it comes to trusting airlines' commitment to reduce their environmental impact, global opinion is divided into three groups with a comparable size :

- Just under a third have a great deal or a fair amount of trust (30%),
- Just over a third have some (37%), and
- One third have very little or no trust (33%).





Base: 19,023 online adults under the age of 75 across 27 countries

The commitment of *commercial airlines to reduce* the impact of airplanes on the environment

The more one flies, the more one tends to trust airlines' environmental commitment: 62% of frequent flyers (those who fly 5+ times per year) have a fair amount or a great deal of trust in the commitment of airlines to reduce airplanes' impact on the environment vs. 38% of moderate flyers (1-4 times per year) and just 23% of infrequent or never-flyers (less than once per year or never).

#### **Trust in the Environmental Commitment of Airlines**

(5+ times per year)

(1-4 times per year)

Net: 38%

(less than once per year, or never)

Net: 23%

Net: 62%

#### **Frequent flyers** 34% 26% 25% 12% 3% Moderate flyers 11% 27% 37% 20% 6% **Infrequent or never -flyers** 7% 16% 38% 26% 14% A great deal A fair amount Some Very little None

**Globally by flying frequency** 

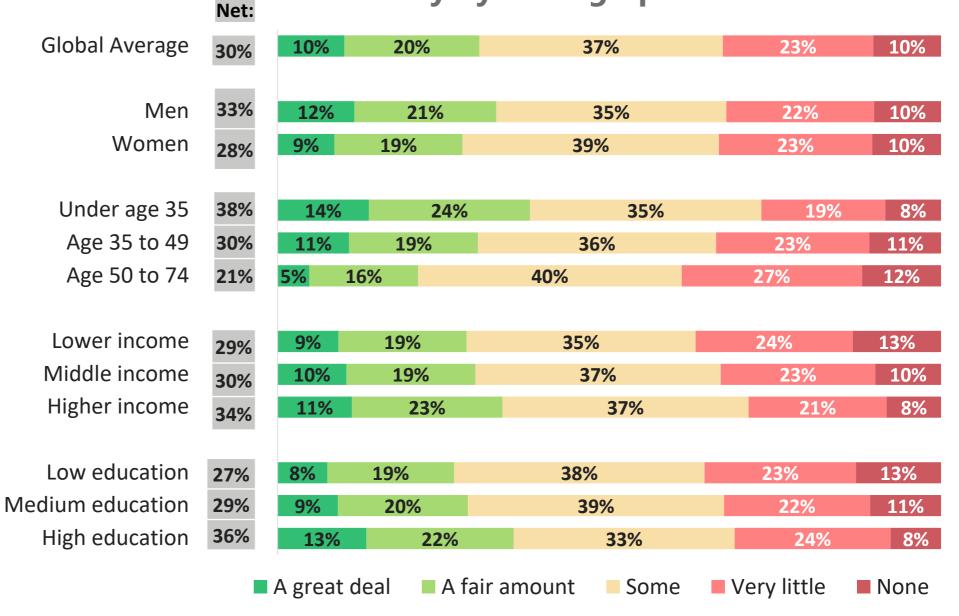
The commitment of commercial airlines to reduce the impact of airplanes on the environment

Trust in the commitment of commercial airlines to reduce the impact of planes on the environment varies most by age. Almost 4 in 10 adults under 35 trust airlines' environmental commitment (38%) vs. 3 in 10 of those aged 35-49 (30%), and 2 in 10 of those aged 50-74 (21%).

Men tend to trust airlines' commitment more than do women (33% vs. 28%) and better educated consumers more than those with a medium or low education level (36% vs. 29% and 27%, respectively).

#### **Trust in the Environmental Commitment of Airlines**

**Globally by demographics** 



The commitment of commercial airlines to reduce the impact of airplanes on the environment

Trust in the commitment of commercial airlines to reduce the environmental impact of airplanes is highest in Saudi Arabia (75% have fair amount or a great deal of it), China (55%), India (52%), and Malaysia (49%). It is lowest in Japan (11%) and South Korea (12%).

In Germany, France, Spain, and South Korea, nearly half of adults have very little or no trust in it.



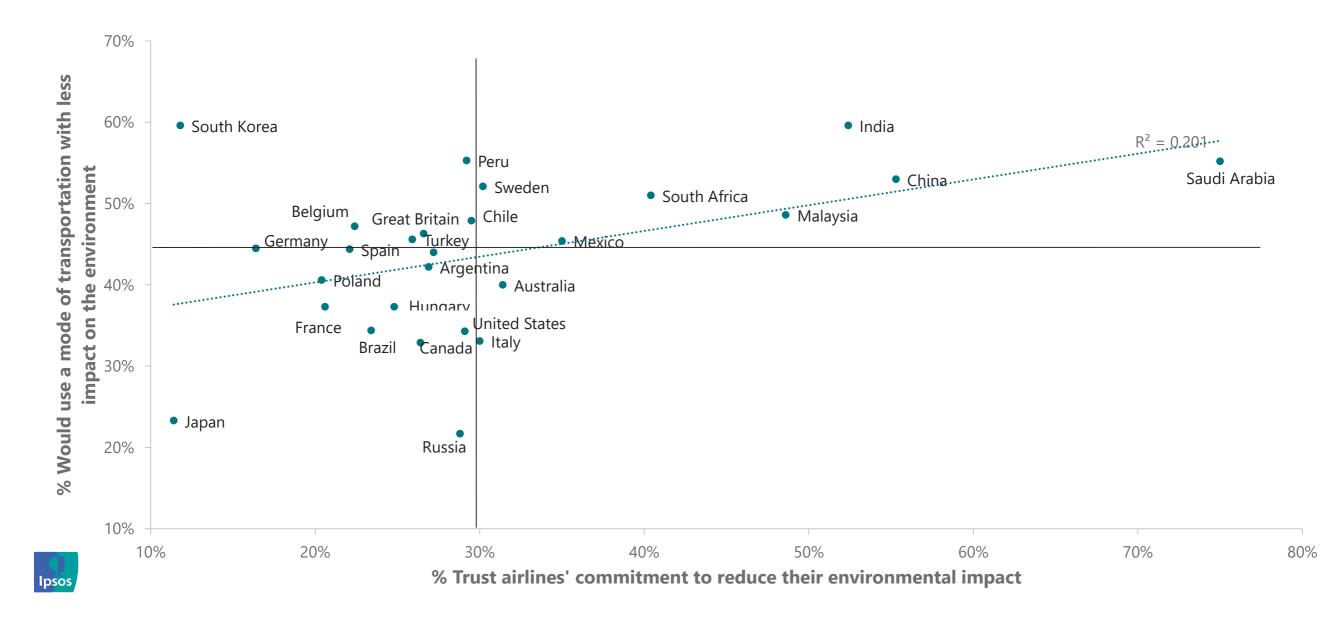
#### **Trust in the Environmental Commitment of Airlines**

By country

Net:

Global Total	30%	10%	209	%		37%			23%	5	10%
Saudi Arabia	75%			51%				24%		14%	6% 4%
China	55%	15%			41%				36%		<b>6% 3%</b>
India	<b>52%</b>	20	0%		32%			26%		15%	7%
Malaysia	49%	9%		39%	6			35%		9%	5 <b>7%</b>
South Africa	40%	13%		28%			33%			22%	4%
Mexico	35%	11%		24%			39%			21%	6%
Australia	31%	10%	22	%		3	9%			23%	6%
Sweden	30%	11%	19	%		4	1%			22%	7%
Italy	30%	7%	23%			32%			25%		13%
Chile	30%	12%		7%		34%			25%		12%
Peru	29%	12%	17	%		35%			26%		10%
United States	29%	8%	21%			38%			24		9%
Russia	29%	10%	19%			30%		22	.%		.9%
Romania	27%	7%	21%				50%			12%	10%
Argentina	27%	7%	20%			42%				8%	9%
Great Britain	27%	7%	20%			36%			30%		8%
Canada	26%	6%	21%			40%				3%	6%
Turkey	26%	7%	19%			41%			23%		11%
Hungary	25%	9%	16%			41%			20%		14%
Brazil	23%	12%	11%			39%			21%		17%
Belgium	22%	5%	18%			6%			29%		12%
Spain	22%	6%	16%		31%			33	%		14%
France	21%	5%	16%		32%			28%	4.00/		0%
Poland	20%	6%	14%			43%		220/	18%		18%
Germany	16%		.1%		35%			33%	200/		16%
South Korea	12/0	1% 10%			42%				38%		8%
Japan	11%	<b>2%</b> 9%			49%				30%		9%
		A	great deal		A fair amou	unt	Some	Ve Ve	ry little	No 🛛	ne

## **Consideration of lower-carbon footprint alternatives to air travel tends to be higher in countries more trusting of airlines' commitment to reduce their impact**



### Trust in Airlines' Ability To Reduce their Impact on the Environment

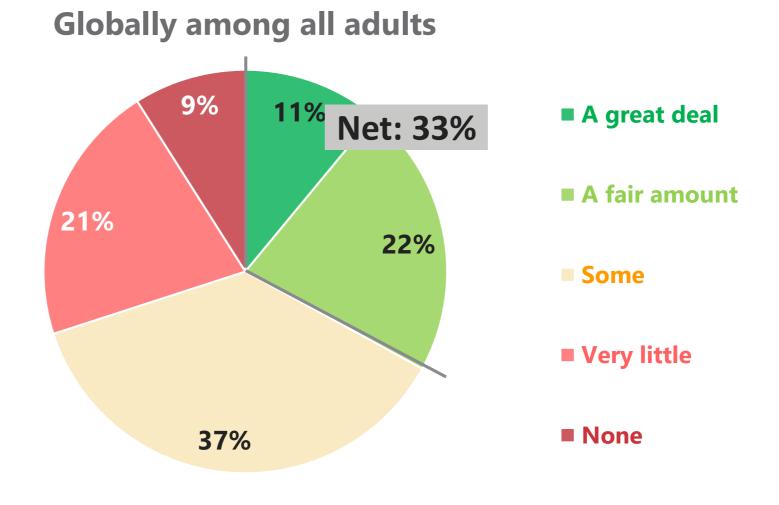
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The ability of commercial airlines to find and implement solutions to reduce their impact on the environment

As is the case regarding airlines' commitment, global opinion is split into three groups of comparable size when it comes to trusting the airlines' ability to reduce their environmental impact:

- One third have a great deal or a fair amount of trust in their ability to do so (33%),
- Just over a third have some trust (37%), and
- Nearly one third have very little or no trust (30%).





The ability of commercial airlines to find and implement solutions to reduce their impact on the environment

Frequent flyers are much likely to have a fair amount or a great deal of trust in airlines' ability to reduce their environmental impact (63% do) than are moderate flyers (41%) and infrequent or never-flyers (25%).

#### **Globally by flying frequency Frequent flyers** (5+ times per year) 9% 4% 33% 31% 24% Net: 63% **Moderate flyers** (1-4 times per year) 12% 28% 37% 18% 5% **Net: 41% Infrequent or never -flyers** (less than once per year, or never) 8% 18% 38% 24% 13% Net: 25% A great deal A fair amount Some Very little None



### Trust in Airlines' Ability to Reduce their Environmental Impact



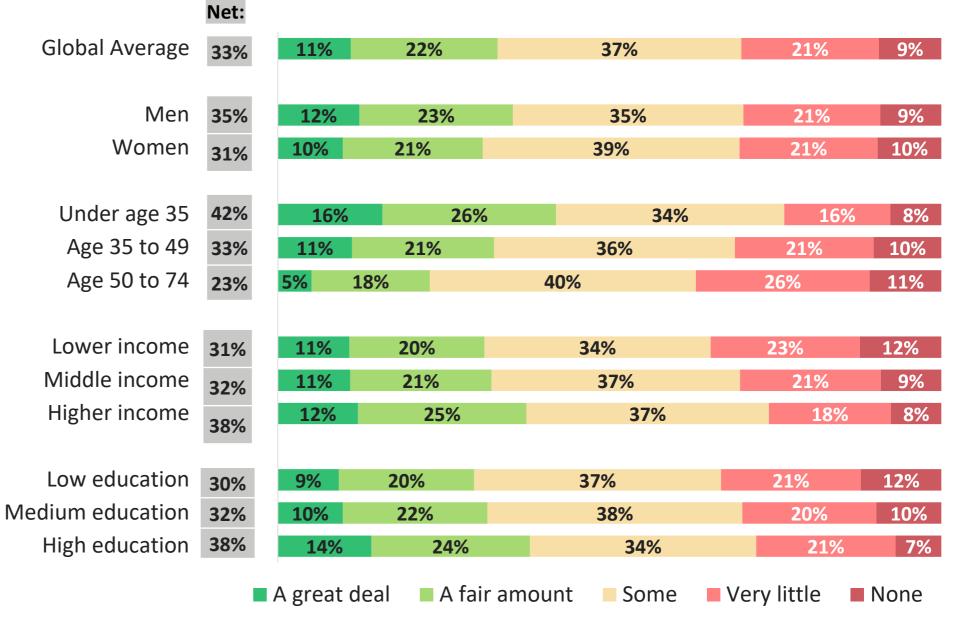
The ability of commercial airlines to find and implement solutions to reduce their impact on the environment

Globally, people under 35 are the most likely to have at least a fair amount of trust in commercial airlines' ability to reduce their impact on the environment (42% do vs. 33% of those aged 35-49 and 23% of those aged 50-74).

Trust is also more prevalent among men (35% vs. 31% among women) and among the more educated (38% vs. 32% and 30%, respectively, among those with a middle or low education level.)

### **Trust in Airlines' Ability to Reduce their Environmental Impact**

**Globally by demographics** 



The ability of commercial airlines to find and implement solutions to reduce their *impact on the environment* 

Trust in the commercial airlines' ability to reduce the environmental impact of airplanes is highest in Saudi Arabia (76% have fair amount or a great deal of trust), China (57%), India (55%), and Malaysia (51%). It is lowest in Japan (11%) and South Korea (13%).

More than four in ten adults in South Korea, Germany, and France have very little or no trust in it.

### lpsos

#### **Trust in Airlines' Ability to Reduce their Environmental Impact**

By country

Net:

Global Average	33%	11%		22%			87%		21%		9%
Saudi Arabia	76%			52%				24%	1	.5%	6% 4%
China	57%	17%	0		40%				35%		5% 3%
India	55%	19	%		35%			27%		12%	7%
Malaysia	51%	11%		L	41%			34%		9%	6%
South Africa	44%	12%		32%				35%		18%	4%
Mexico	40%	11%		29%			39	9%		16%	5%
Turkey	35%	14%		20%			36%		19%		11%
United States	34%	10%		25%			37%		20	%	9%
Australia	34%	10%		24%			40%			21%	6%
Argentina	34%	11%		23%			40%		1	9%	8%
Russia	33%	13%		20%		27%		2	1%	1	8%
Sweden	33%	11%		22%			41%			20%	6%
Romania	32%	6%	26%	6			48%			13%	8%
Peru	32%	14%		17%		38	3%		23%		8%
Chile	31%	11%		20%		36%			22%		11%
Italy	31%	6%	24%	0		33%			23%		13%
Great Britain	29%	8%	21%			37%			28%		6%
Canada	29%	7%	22%			42	%		2	4%	5%
Brazil	<b>26%</b>	13%	13	%		38%			21%		15%
Spain	25%	7%	18%			35%			29%		10%
Belgium	25%	6%	19%			36%			30%		10%
France	25%	5%	20%		31	.%		26%		1	8%
Hungary	24%	10%	14%			43%			19%		14%
Poland	23%	6%	17%			44%			17%		17%
Germany	17%	6%	11%		38%			30	%		15%
South Korea	13%	1 <mark>% 11%</mark>			40%				40%		8%
Japan	11%	1 <mark>% 10%</mark>			50%				30%		9%

■ A great deal ■ A fair amount ■ Some ■ Very little ■ None

**GAME CHANGERS** 

- These are the findings of a 27-country Ipsos survey for the World Economic Forum conducted via Ipsos's Global Advisor online survey platform between June 21 and July 5, 2019.
- For this survey, Ipsos interviewed a total of 19,023 adults aged: 19-74 in South Korea; 18-74 in Canada, China (mainland), Malaysia, South Africa, Turkey, and the United States; and 16-74 in all other markets.
- The sample consists of 1000+ individuals in each of Australia, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, Japan, Spain, and the United States, and 500+ in each of Argentina, Belgium, Chile, Hungary, India, Malaysia, Mexico, Peru, Poland, Romania, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey.
- The survey data have been weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the market's most recent census data. Data collected each month are also weighted to give each market an equal weight in the total "global" sample.
- Online surveys can be taken as representative of the general adult population under the age of 75 in Argentina, Australia, Belgium,

Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, and the United States. Online samples in Brazil, Chile, China (mainland), India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, South Africa and Turkey are more urban, more educated and/or more affluent than the general population and the results should be viewed as reflecting the views of a more "connected" population

- Sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error. The precision of the Ipsos online polls is measured using a Bayesian Credibility Interval. The credibility interval around percentages based on single-month data is of +/- 3.5 percentage points for markets where the monthly sample is 1,000+ and +/-4.8 points for markets where the monthly sample is 500+. Click here for more information on the Ipsos use of credibility intervals.
- Where results do not sum to 100 or the "difference" appears to be+/-1 more/less than the actual value, this may be due to rounding, multiple responses, or the exclusion of don't knows or not stated responses.

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