Sustainability in Air Travel report

Skyscanner



October 2021

Understanding how travel attitudes have changed over the course of the pandemic.

Are travellers willing to pay a higher price for more sustainable travel?

Introduction

Over the last 18 months, everything has changed, and that includes people's attitudes towards sustainability – both in their everyday lives and when it comes to how they travel. This research was conducted to better understand how the pandemic has impacted people's attitudes and behaviour around more responsible air travel.

"Reaching net-zero greenhouse gas emissions is going to be a herculean task. The global pandemic has exposed the challenges of achieving global cooperation in pursuit of a common goal, so it won't be easy for governments and the travel industry to achieve their ambitious environmental goals. But peoples' support for that goal is widespread. Large proportions of society across all researched countries show great awareness of sustainability issues and an ever-growing interest in travelling more sustainably. The research suggests that consumers will be prepared to buy sustainable travel offers if these are made readily and easily available to them. "

Eva Stewart, Global Sector Head of Travel & Tourism, YouGov

Summary



Key takeaways

- Awareness around sustainability is huge and it's seen as a key issue. Due to the pandemic, people are trying to be more sustainable in their lives, avoid products with excessive packaging and buy more local produce.
- 2. People are willing to accept a level of personal accountability towards making more sustainable travel choices, but believe the **responsibility lies** chiefly with governments and the travel industry.
- 3. In general, people feel there's **very little information regarding sustainability.** And what is available is very confusing.
- 4. Many don't believe carbon offsetting helps to reduce the effect of global travel. Instead, they believe **more fuel-efficient aircrafts and sustainable aviation fuel** could be the answer. Overall, they feel there's **too little or confusing information** on the benefits of carbon offsetting when deciding which flights to book.
- 5. Across all countries surveyed, **cost** remains a key factor and remains the deciding factor when it comes to booking plane tickets.

Sustainable Values & Lifestyle

Similarities and differences in attitudes and lifestyle choices across surveyed countries Caring for the environment dominates other important environmental and social issues among all the respondents of the Skyscanner sustainability survey. In the UK, Germany, Australia and South Korea, more than half of respondents thought it was the top concern, while in Japan 38% also agreed.

While Germans see caring for the environment as the top social issue, those in the UK, Australia, South Korea and Japan think increasing sustainability to tackle climate change is the most important environmental and social issue in modern times. In America, caring for the environment is only marginally beaten by the desire to see improved access to healthcare.

Australians are more likely than other nations to say they're making more sustainable choices in their lifestyles now than compared to 12 months ago. 40% of Japanese are making the same sustainable choices now that they were 12 months ago, while a quarter haven't considered making any sustainable choices in that time.

In stark contrast to other countries, 19% of South Koreans are making fewer sustainable choices than 12 months ago. The survey respondents in the UK, Australia, Germany and the US opt for sustainable choices mostly because they are convinced that it is everyone's role to take care of the planet.

The pandemic has had a more substantial influence on the choices South Koreans make regarding sustainability, whereas in Japan, media played the key role. To improve sustainability as part of their lifestyle, South Koreans, Australians, Germans, and UK travellers especially try to avoid single-use plastics and favour buying locally produced goods. In comparison, Americans and Japanese do this less often.

In all countries, caring for the environment is the most important social issue, followed by improving access to healthcare and increasing sustainability.

Caring for the environment 55% Improving access to healthcare 50% Increasing sustainability to tackle climate change 48% Ensuring access to fair justice for all 40% Improving social equality 40% Animal welfare 40% Improving access to education 38% 37% Improving global water security 37% Improving global food security Helping disadvantaged communities 32% 31% Improving access to welfare support 30% Fair trade 27% Increasing diversity and inclusion 21% Improving social mobility 20% Supporting charitable organisations 5% None of the above Total across 6 countires 6% Don't know 0% 20% 40% 60% 80% 100%

Which of these environmental and social issues are important to you personally? You can select as many as you like.

Base: all respondents from UK, USA, Australia, Germany, South Korea, Japan (6375)

Increasing sustainability ranks first in the UK, Australia and Japan, while Germans see caring for the environment and Americans see access to healthcare as the most important issues.

Which of these environmental and social issues are important to you personally? You can select as many as you like.

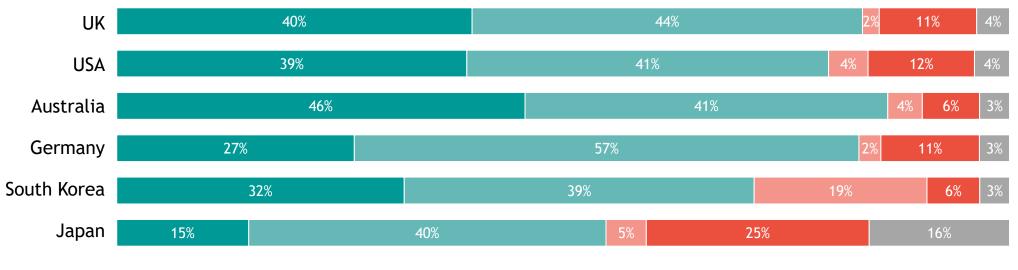


Top 3 important environmental and social issues



Almost half of Australians made more sustainable choices in the last 12 months than before. Japanese consider sustainable lifestyle options the least compared to other nationalities.

We would like you to think about your own lifestyle and sustainable choices over the last 12 months during the pandemic. Which of the following statements best describes you?



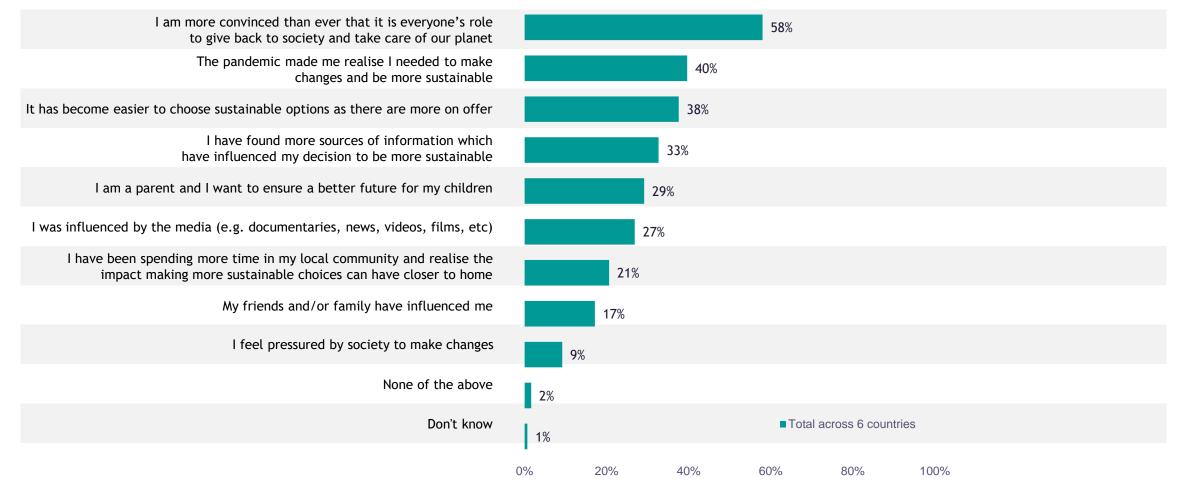
- I am making more sustainable choices in my lifestyle than I was 12 months ago
- I am making the same sustainable choices in my lifestyle as I was 12 months ago
- I am making fewer sustainable choices in my lifestyle than I was 12 months ago
- I haven't really considered making sustainable choices in my lifestyle over the last 12 months

Don't know

Base: respondents who think environmental and social issues are important: UK (1083), USA (927), Australia (966), Germany (949), South Korea (958), Japan (809)

Across all markets, most people making more sustainable choices now than they were a year ago are doing so because they believe it's everyone's role to take care of our planet.

You mentioned you've made more sustainable choices over the past 12 months. What are your reasons for this? Please select all that apply.



Base: all respondents from UK, USA, Australia, Germany, South Korea and Japan who are making more sustainable choices (1903)

The pandemic has had a more significant impact on South Koreans' sustainability choices compared to other countries. In Japan, however, media plays a more influential role than the pandemic when it comes to sustainability.

You mentioned you've made more sustainable choices over the past 12 months. What are your reasons for this? Please select all that apply.



Top 3 reasons for more sustainable choices over the past 12 months

Base: respondents who are making more sustainable choices: UK (433), USA (364), Australia (429), Germany (253), South Korea (305), Japan (119)

Avoiding products with excessive packaging or single-use plastics are the most common actions people have taken to make their lifestyles more sustainable in the past year.

Over the last 12 months, which of the following actions have you personally taken to improve the sustainability of your lifestyle?

Avoiding products which have a lot of excess packaging	519	%	29 % 12%	7%	
Avoiding products made with single-use plastics	50%		31% 12%	7%	
Buying more locally produced goods	44%	30	18%	8%	
Reducing the number or frequency of new clothes that I buy	41%	30%	22%	6%	Yes, to improve the
Saving energy at home, for example by installing insulation or choosing household appliances that are more energy efficient		39	9% 13%	8%	sustainability of my lifestyle
Walking, cycling, using public transport instead of driving a car or motorbike	38%	39%	18%	6%	
Buying more seasonal products	37%	37%	18%	9%	No, I haven't done this
Saving water at home, for example by using water butts to collect rainwater for your garden or having shorter showers		45	% 12%	6%	
Choosing brands that have ethical values and practices	34%	43%	11%	12%	= Vac but not to improve the
Stopped purchasing certain brands or products because I was concerned about their ethics or sustainability		48%	10%	10%	Yes, but not to improve the sustainability of my lifestyle
Switched to renewable energy sources or products	29%	53%	9%	10%	
Eat less red meat, dairy products, switching to a plant-based diet	29%	53%	12%	5 7 %	■ Don't know
Changed some, or all, of my personal financial investments for ethical or sustainable investments		67%	6%	10%	
Chose to use rail in place of air travel	15%	64%	11%	10%	
	0% 20%		80%	1009	%

Total across 6 countries

Base: all respondents from UK, USA, Australia, Germany, South Korea, Japan (6375)

Americans focused on saving energy more often than avoiding single-use plastics compared to other countries.

Over the last 12 months, which of the following actions have you personally taken to improve the sustainability of your lifestyle?

Top 3 actions taken over the last 12 months to improve the sustainability of lifestyle



Sustainable Travel Attitudes & Effect of the Pandemic

Who should be responsible for sustainable travel and has the pandemic accelerated change? The importance of making travel more sustainable carries far more weight for people in the UK and USA compared to other countries. In Japan, it's significantly less relevant.

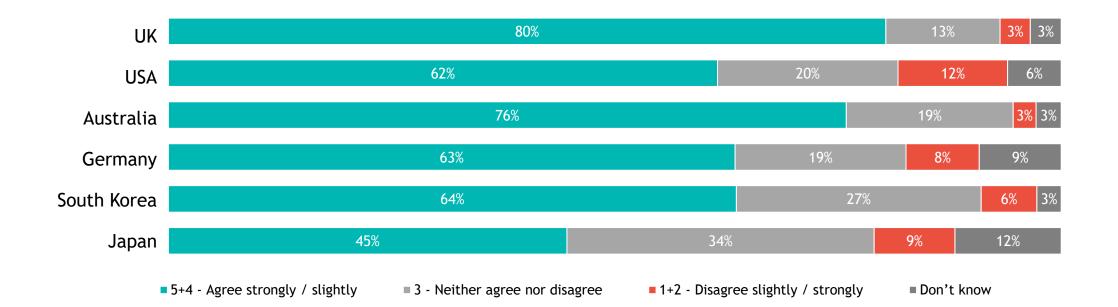
According to UK travellers and Australians, national governments should take the leading role in achieving sustainable travel. Germans and Americans think solutions should be spearheaded by the travel industry. In South Korea and Japan, it's seen as a responsibility of citizens themselves.

People surveyed in all countries thought investment in more fuel-efficient aircrafts would be the most effective way to reduce CO2 emissions. South Koreans, Australians and those in the UK thought this should be further boosted by external investment from industry and governments. The benefits of carbon offsetting in achieving climate neutral or positive outcomes was emphasised by South Koreans and Australians.

Compared to other countries, South Koreans felt stronger that the COVID-19 pandemic shifted perspective on the importance of sustainable travelling. This led to searching for less crowded destinations and spending money with local businesses – a trend that's also seen in other markets. Over a third of respondents say the pandemic has made them want to travel more than ever before, however nearly half of respondents in the UK, USA, Australia, Germany and South Korea reported that they would consider travelling by alternative means.

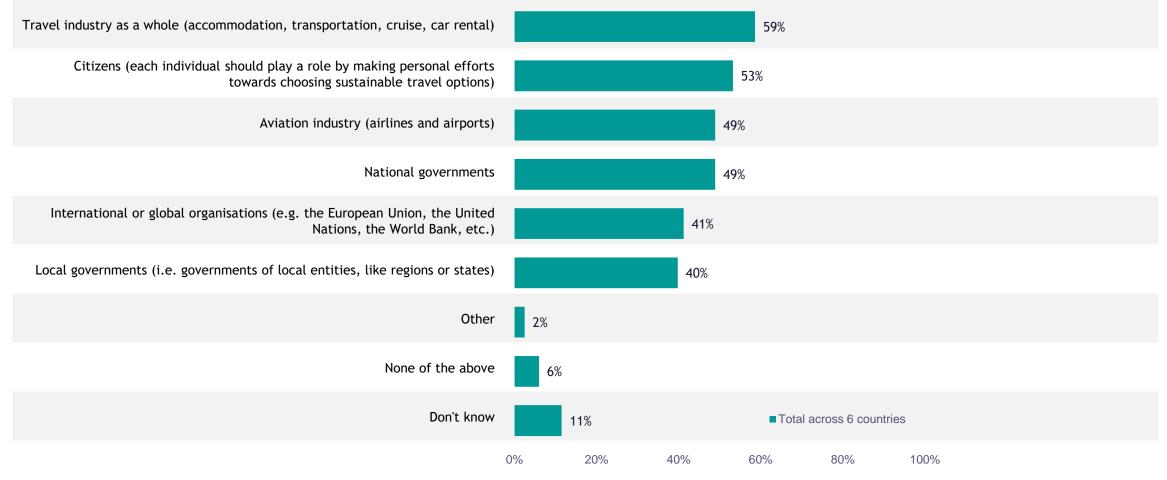
UK travellers and Australians are most convinced about the importance of making travel more sustainable, whereas the Japanese are on the fence.

To what extent do you agree or disagree with the following statement? It is important to make travel more sustainable.



Nearly 60% of all respondents agree that making travel more sustainable is the travel industry's responsibility.

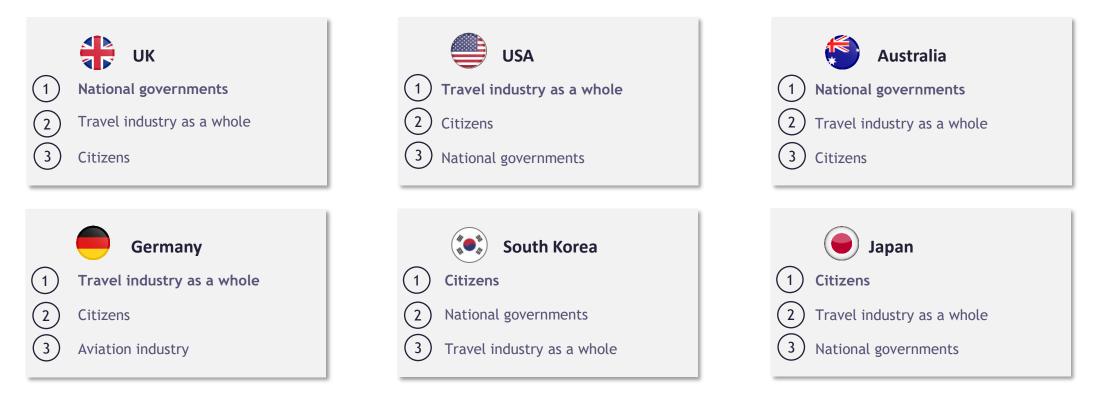
Which of the following do you think should play a role in achieving sustainable travel?



Base: all respondents from UK, USA, Australia, Germany, South Korea, Japan (6375)

Those in the UK and Australia think national governments should take the leading role in achieving sustainable travel, while South Koreans think it's up to citizens to make a difference.

Which of the following do you think should play a role in achieving sustainable travel?



Top 3 important roles in achieving sustainable travel

Investment in more fuel-efficient aircrafts is seen across all surveyed countries as the top solution for reducing CO2 emissions caused by air travel.

Using a scale of 1–5 where 1 is 'will have no effect' and 5 is 'will have a significant effect', to what extent do you think each of the following will be effective in reducing CO2 emissions caused by air travel?

Investment in more fuel-efficient aircrafts				66%				14%	9 %	6 10%	
More investment - from industry, government and individual investors - in future solutions (e.g. sustainable aviation fuel, carbon capture technology) to make air travel carbon neutral				61%				16%	10%	13%	
Fiscal incentives/subsidies/tax cuts for airlines who invest in greener fuel				60%				17%	12%	12%	
Government regulations, for example a carbon tax			5	2%			18%		18%	12%	
Carbon offsetting			46%			2	1%	16%	6	18%	
	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

Total across 6 countries

■ Will have some effec / a significant effect

Neither effective nor ineffective

Will be somewhat ineffective / will have no effect

Don't know

Base: all respondents from UK, USA, Australia, Germany, South Korea, Japan (6375)

Besides investment, fiscal incentives and subsidies for airlines which invest in greener fuel are rated highly as one of the most effective solutions to tackle CO2 emissions.

Using a scale of 1–5 where 1 is 'will have no effect' and 5 is 'will have a significant effect', to what extent do you think each of the following will be effective in reducing CO2 emissions caused by air travel?

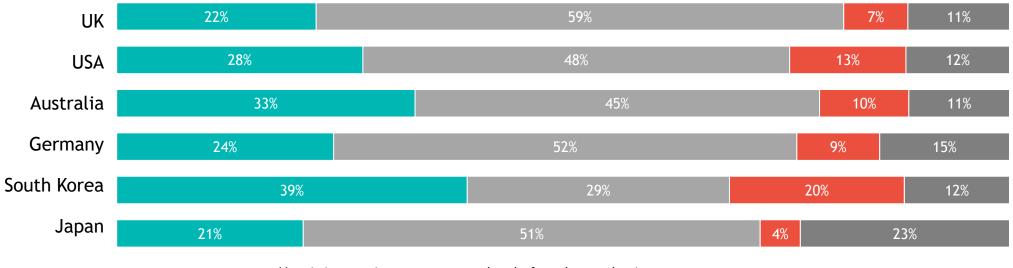


Top 3 actions effective in reducing CO2 emissions caused by air travel

Base: all respondents, UK (1190), USA (1041), Australia (1041), Germany (1039), South Korea (1027), Japan (1037); displayed answer categories: Top two boxes (<5> Will have a significant effect + <4> Will have some effect).

39% of South Koreans feel that sustainability in travel has become more important since the pandemic.

Would you say the pandemic has shifted your perspective on the importance of travel-related sustainability?



- Yes, it is more important to me than before the pandemic
- No, it holds the same level of importance to me now than before the pandemic
- No, it is less important to me than before the pandemic
- Don't know

Due to the pandemic, searching for less crowded/popular destinations has become more important across all markets. Other travel criteria, especially in terms of sustainability, remain more unchanged.

Would you say the pandemic has shifted your perspective on the importance of each of the following?

	Total across 6 countries										
Search for destinations that are less crowded/popular	39%			40%				<mark>9</mark> % 12%			
Prioritise spending money with local businesses or on local produce	31%				45%				10%	13%	
Seek authentic experiences that are representative of local culture		23%			52%				10%	14%	
Stay in eco-friendly or green accommodation		23%				50%			11%	15%	
Search for sustainable travel offers		23%				49%			12%	17%	
Prioritise booking a flight with lower CO2 emissions		20%			49	%		12	2%	19%	
Look for ways to offset the carbon footprint from my holiday		19%		51%			11% 19%				
	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Yes, it is more important to me than before the pandemic										
		\blacksquare No, it holds the same level of importance to me than before the pandemic									
		■No, i	t is less i	mportant	to me th	an befor	re the pa	ndemic			
		■ Don't know									

Base: all respondents from UK, USA, Australia, Germany, South Korea, Japan (6375)

Searching for less crowded destinations is a top priority across all six markets. For Australians, seeking authentic experiences of local culture is even more important.

Would you say the pandemic has shifted your perspective on the importance of each of the following?- "Yes, it is more important to me than before the pandemic"

Top 3 things when booking a flight that become more important than before the pandemic



Base: all respondents: UK (1190), USA (1041), Australia (1041), Germany (1039), South Korea (1027), Japan (1037); displayed answer category: "Yes, it is more important to me than before the pandemic".

40% of respondents said the pandemic hasn't changed their attitudes towards travel. However, nearly half said they'd consider travelling by alternative means.

Thinking about the impact the pandemic has had on your attitudes towards travel, to what extent do you agree or disagree with each of the following statements?

I would seriously consider travelling by alternative means rather than by plane, wherever possible, for a holiday or other trip	46%			28%		18%	8%
The pandemic has influenced the way I think about the financial impact tourism has on communities and destinations		46%		30%	,	16%	
The pandemic has not changed my attitude towards travel, even if I travelled less or not at all		40%	26%			27%	
Because of the pandemic, I want to travel more than ever before		34%	25%		35%		6%
Because of the pandemic, I'm interested in travelling to different destinations than I would not have considered before		34%		29%		31%	
Because of the pandemic, I prefer to spend money on sustainable travel which benefits the communities/places I'm visiting		31%	38%			21%	10%
	0% 10% 20% 30% 40% Agree slightly / strongly Disagree slightly / strongly					80% gree nor disa v	90% 100 ⁰ agree

Total across 6 countries

Base: all respondents from UK, USA, Australia, Germany, South Korea, Japan (6375)

Americans, Germans and UK travellers are considering alternative means to travel, whereas Japanese respondents have not changed their attitude.

Thinking about the impact the pandemic has had on your attitudes towards travel, to what extent do you agree or disagree with each of the following statements?



Top 3 attitudes towards travel which the pandemic has impacted most

Base: all respondents: UK (1190), USA (1041), Australia (1041), Germany (1039), South Korea (1027), Japan (1037); displayed are top two boxes (<5> Agree strongly + <4> Agree slightly), sorted in descending order by total.

Sustainable Travel Behaviour & Carbon Offsetting

Are travellers willing to pay more for sustainable travel? Globally, all travellers want to choose less crowded destinations, seek authentic experiences of local culture and spend money with local businesses. South Koreans are more likely to search for sustainable travel offers, while Australians prioritise a flight with lower CO2 emissions.

South Koreans and Australians prefer brands that care about environmental/social issues and have the same ethical values as themselves.

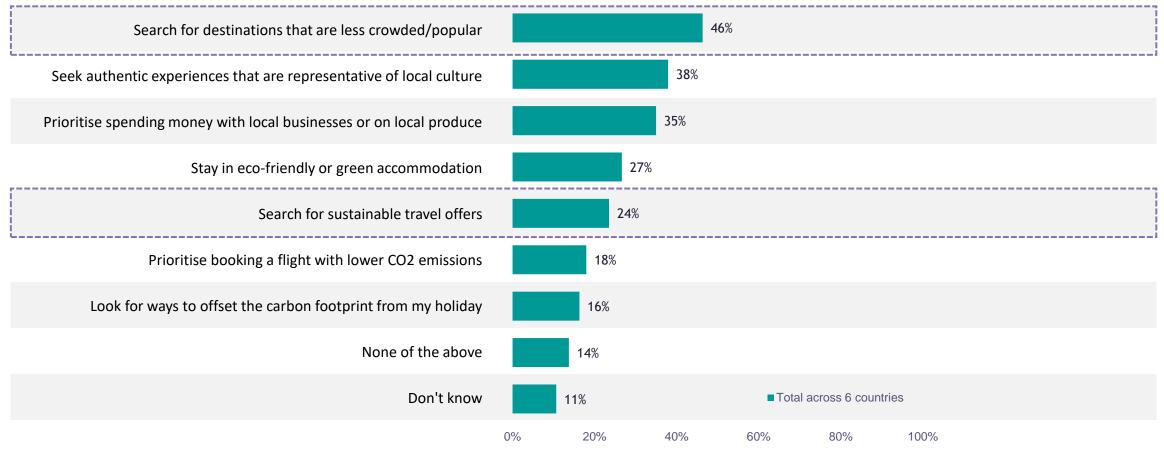
Germans and South Koreans place greater importance on sustainable travelling, while for UK travellers, Americans and Australians, price plays a far more important role. And South Koreans and Japanese would like to travel more sustainably but do not know how. In general, people say there's not enough information about sustainable travel options.

The awareness of "carbon offsetting" is significantly smaller among South Koreans and Japanese. Cost is the most important reason for not considering offsetting in all countries except for Germany, where they're rather sceptical that offsetting carbon emissions helps to reduce travel's environmental impact. Across all countries surveyed, only a third of people would be willing to pay more for a more sustainable flights.

However, to help make air travel more sustainable, those in the UK, America and Australia would consider eliminating single-use plastic, while Germans, South Koreans and Japanese prefer the development of sustainable fuels.

Nearly half of respondents are considering less crowded destinations when booking outside their home country.

Imagine you're booking a trip outside your home country. Don't worry if you don't currently travel or go on holiday outside your own country, we're still interested in your opinion. In general, which, if any, of the following would you consider doing when booking? Please select all that apply.



Base: all respondents from UK, USA, Australia, Germany, South Korea, Japan (6375)

Most people are searching for less crowded destinations. However, spending money on local businesses is top of mind too.

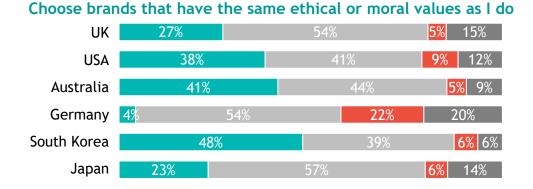
Imagine you're booking a trip outside your home country. Don't worry if you don't currently travel or go on holiday outside your own country, we're still interested in your opinion. In general, which, if any, of the following would you consider doing when booking? Please select all that apply.

Top 3 attitudes towards travel that the pandemic has impacted most

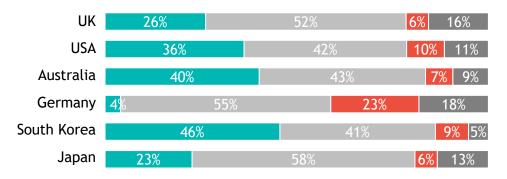


South Koreans, followed by Australians, choose sustainable-oriented brands that correspond to their values more often.

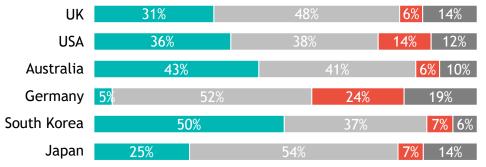
Thinking about any travel product or service you've purchased or considered purchasing over the last 12 months (for example, airfares, hotels or experiences), have you been more or less likely to choose the following?



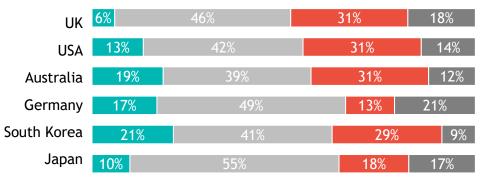
Consider brand values or activities when deciding which brands to buy



Choose brands that are taking action to tackle environmental and/or social issues



Choose a brand that didn't offer sustainable options



■ 5+4 - More likely than before ■ 3 - Equally likely than before ■ 1+2 - Less likely than before ■ Don't know

In all six markets, people agree there aren't enough sustainable travel options. They also feel sustainable travel options are more expensive and when booking flights, price is key!

Which, if any, of the following statements comes closest to you when thinking about your own travel and sustainability behaviour? Please select all that apply.

There aren't enough sustainable travel options	26%
Sustainable travel options come with higher costs	24%
When selecting flights, price is more important to me than sustainability	24%
I have never considered sustainability when booking a flight	24%
I'd like to travel more sustainably but I don't know how	23%
It's hard to find/understand information about sustainable air travel options	21%
Travelling sustainably is important to me	18%
I feel guilty about my carbon footprint from air travel	12%
When it comes to travel, I have no interest in sustainability	11%
I actively seek out travel destinations that are committed to sustainability	9%
I seek travel providers that are committed to sustainability	9%
I actively look for flights with lower carbon emissions	8%
None of the above	12% Total across 6 countries
Don't know	
	0% 20% 40% 60% 80% 100%
Base: all respondents from UK, USA, Aust	stralia, Germany, South Korea, Japan (6375)

Across the UK, USA and Australia, price is the most important factor, while in South Korea and Japan there's a lack of knowledge on how to travel more sustainable.

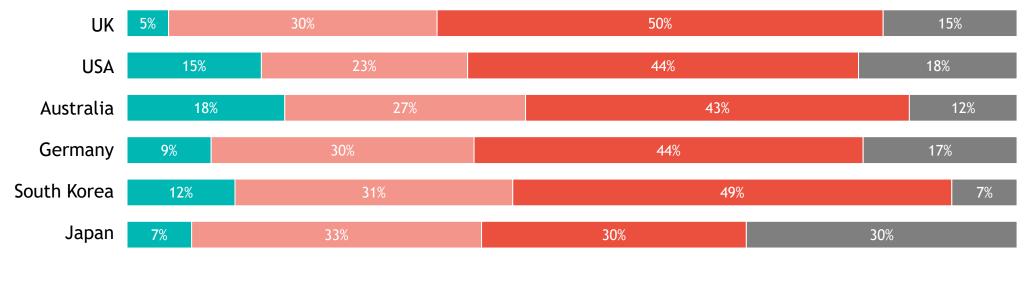
Which, if any, of the following statements comes closest to you when thinking about your own travel and sustainability behaviour? Please select all that apply.

Top 3 statements that come closest to own travel and sustainability behaviour



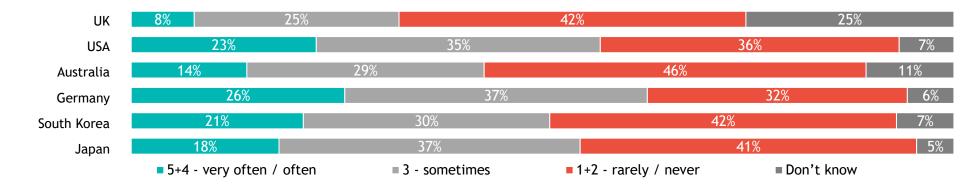
Most people, especially in South Korea and the UK, state that there's not enough clear information about sustainable travel options.

Do you think there is enough clear information available about sustainable travel options?



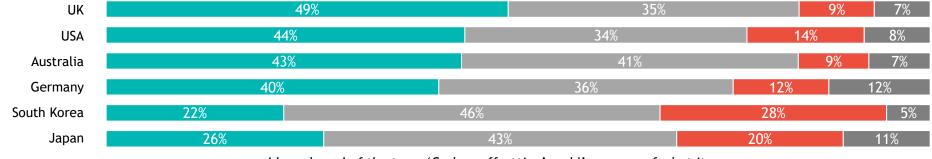
Yes No, it is confusing and difficult to understand No, there is not enough information available on sustainable travel Don't know

Respondents in the UK show the highest awareness of 'carbon offsetting'; however, they are the least worried about their ecological footprint.



How often, if at all, do you worry about your ecological footprint (i.e. the carbon emissions that you as an individual produce by travelling)?

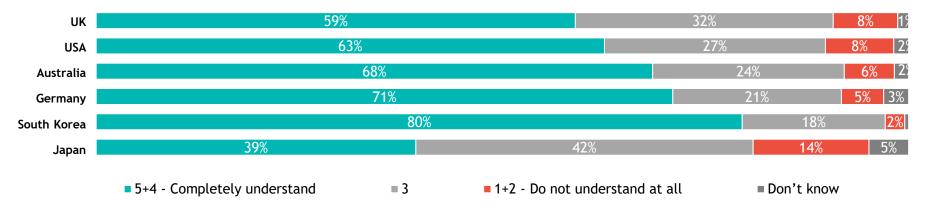
We would now like you to think about the term 'Carbon offsetting' in relation to sustainability. Which of the following best describes you?



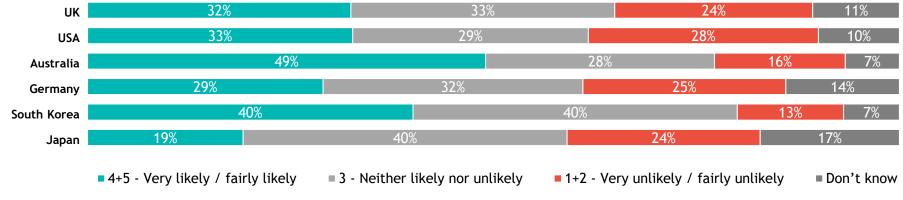
- I have heard of the term 'Carbon offsetting' and I'm aware of what it means
- I have heard of the term 'Carbon offsetting' but I'm unsure what it means
- I have not heard of the term 'Carbon offsetting'
- Don't know

People's understanding of offsetting their travel footprint is high across all countries, apart from Japan. Half of Australians are likely to consider offsetting when booking a flight.

On a scale of 1 to 5 where '1 = do not understand at all' and '5 = completely understand', do you understand what offsetting your travel footprint is in relation to flights?



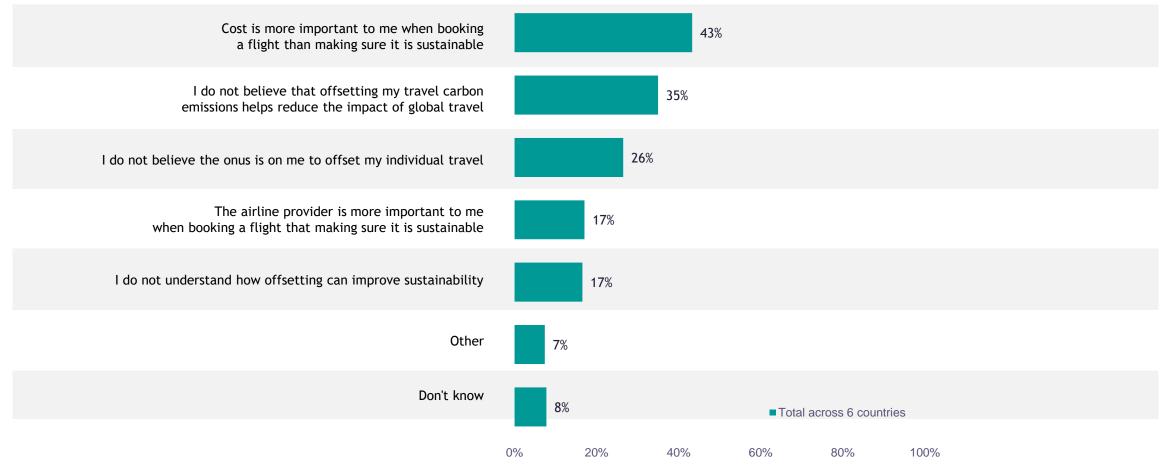
Now that you are more aware of offsetting in relation to flights, how likely are you to consider this next time you book a flight?



Top base: respondents who have heard of the term 'Carbon offsetting' and are aware of what it means: all respondents (2416): UK (591), USA (457), Australia (443), Germany (419), South Korea (223), Japan (283);

Cost is the most important factor when booking a flight in all six markets, while a third of respondents don't believe carbon offsetting will help reduce the impact of global travel.

Still thinking about offsetting, what are your reasons for being unlikely to consider offsetting? Please select all that apply.



Base: all respondents from UK, USA, Australia, Germany, South Korea, Japan (6375)

People from the UK, America and Australia are unlikely to consider offsetting due to costs, while Germans don't believe it can reduce the global impact of travel.

Still thinking about offsetting, what are your reasons for being unlikely to consider offsetting? Please select all that apply.

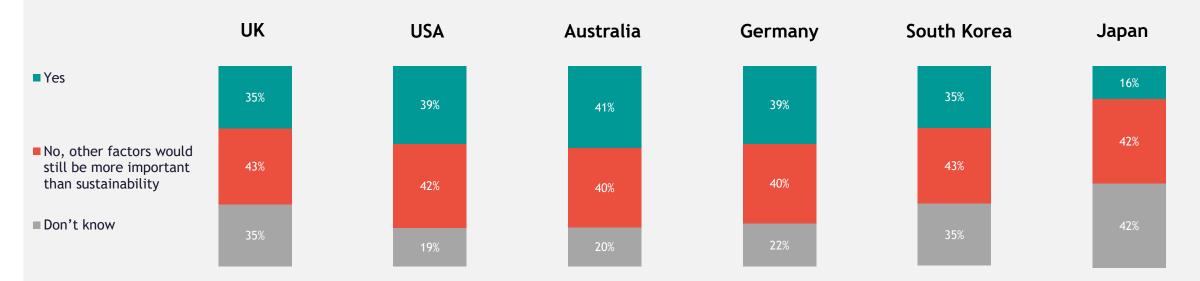


Top 3 reasons for being unlikely to consider offsetting

Base: Respondents who are very/fairly unlikely to consider offsetting: UK (275), USA (297), Australia (179), Germany (258), South Korea (135), Japan (259)

The majority of people prioritise cost over all other factors when booking a flight. About a third of consumers in each country (except Japan) are willing to pay more for a more environmentally friendly flight.

Would you be willing to pay more for a flight that was more environmentally friendly?



Willingness to pay more for a flight that's more environmentally friendly

Nearly a third of respondents in Germany, Australia, South Korea, the USA and UK would pay approx. 11–20% more for their ticket if providers were offering sustainable options.

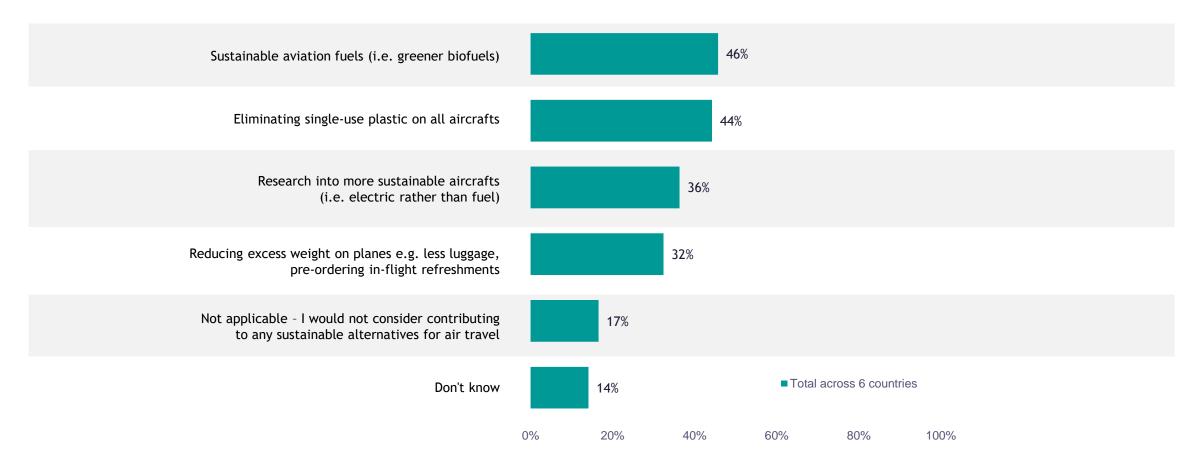
How much more would you be willing to pay towards the cost of the ticket if the provider was offering more sustainable options (e.g. a lower emission flight)?



Base: all respondents: UK (1190), USA (1041), Australia (1041), Germany (1039), South Korea (1027), Japan (1037) *Ticket prices asked in this question differ per country: the prices for UK and Germany refer to short-haul flights, whereas for USA, Australia, South Korea and Japan they prefer to medium- or long-haul flights.

Nearly half of respondents across all markets feel that sustainable aviation fuel and eliminating single-use plastic on board will make air travel more sustainable.

From the list below, which, if any, of the following alternatives would you consider contributing to (beyond offsetting) to help make air travel more sustainable?



Base: all respondents (6375): UK (1190), USA (1041), Australia (1041), Germany (1039), South Korea (1027), Japan (1037), sorted in descending order by total.

Elimination of single-use plastic is considered an alternative to offsetting by the UK, America and Australia. Germans, South Koreans and Japanese feel that sustainable aviation fuel is a more effective solution.

Still thinking about offsetting, what are your reasons for being unlikely to consider offsetting? Please select all that apply.



Top 3 reasons for being unlikely to consider offsetting

Methodology

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Target group: National representative 18+ per country



Methodology:

Quantitative online survey in the YouGov panel and partner panel

2	
7	-5

Sample size:

n = 1.190
n = 1.041
n = 1.041
n = 1.039
n = 1.027
n = 1.037



Weighting: Population-representative sample per country



Length of the interview: 9,5 Minuten



Field time:

United Kingdom: USA: Australia: Germany: South Korea: Japan:

27.08.-02.09.2021 03.09.-09.09.2021 03.09.-10.09.2021 03.09.-09.09.2021 03.09.-10.09.2021 07.09.-10.09.2021



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