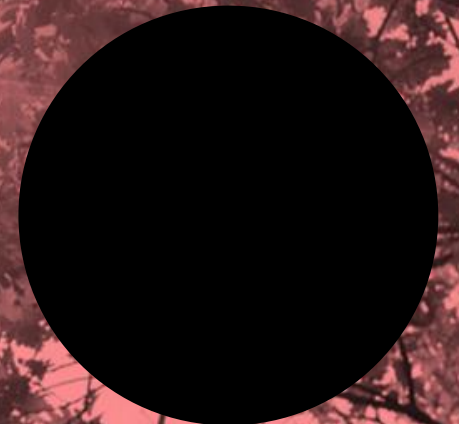

Civil Aviation Authority

UK Aviation Consumer Survey

Wave 9 (Winter 2020)

Aviation and the Environment Report



Background and method

The Civil Aviation Authority (CAA) has re-commissioned Savanta ComRes, an independent research organisation, to conduct the ninth wave of its bi-annual consumer research tracking study. The research is used by the CAA to develop a deeper understanding of UK consumers' flying behaviours and their attitudes towards the aviation industry. This research programme is carried out in accordance with the requirements of the international quality standard for market research and will inform the CAA's policy and strategy as it regulates the aviation market.

Methodology



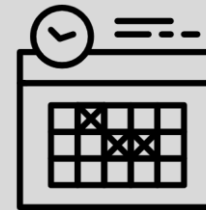
Sample

A total of 3,504 interviews were conducted with a demographically representative sample of UK adults (18+).



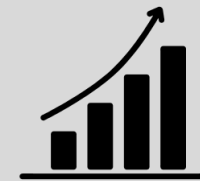
Method

Interviews were conducted online and over the telephone.



Fieldwork dates

13th Nov – 8th Dec 2020



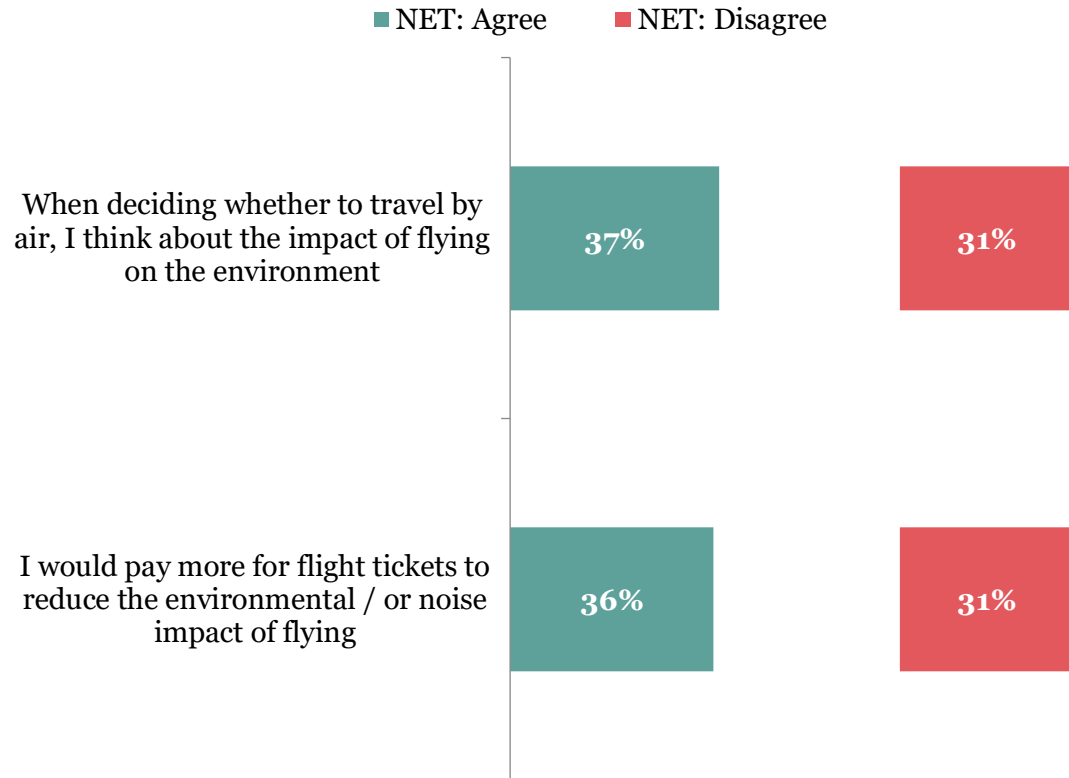
Interpretation

With a sample size of 3,504 the margin of error on results at a 95 per cent confidence level is ± 1.66 . Findings marked with an asterisk (*) indicate a low base size. These results should be treated with caution.

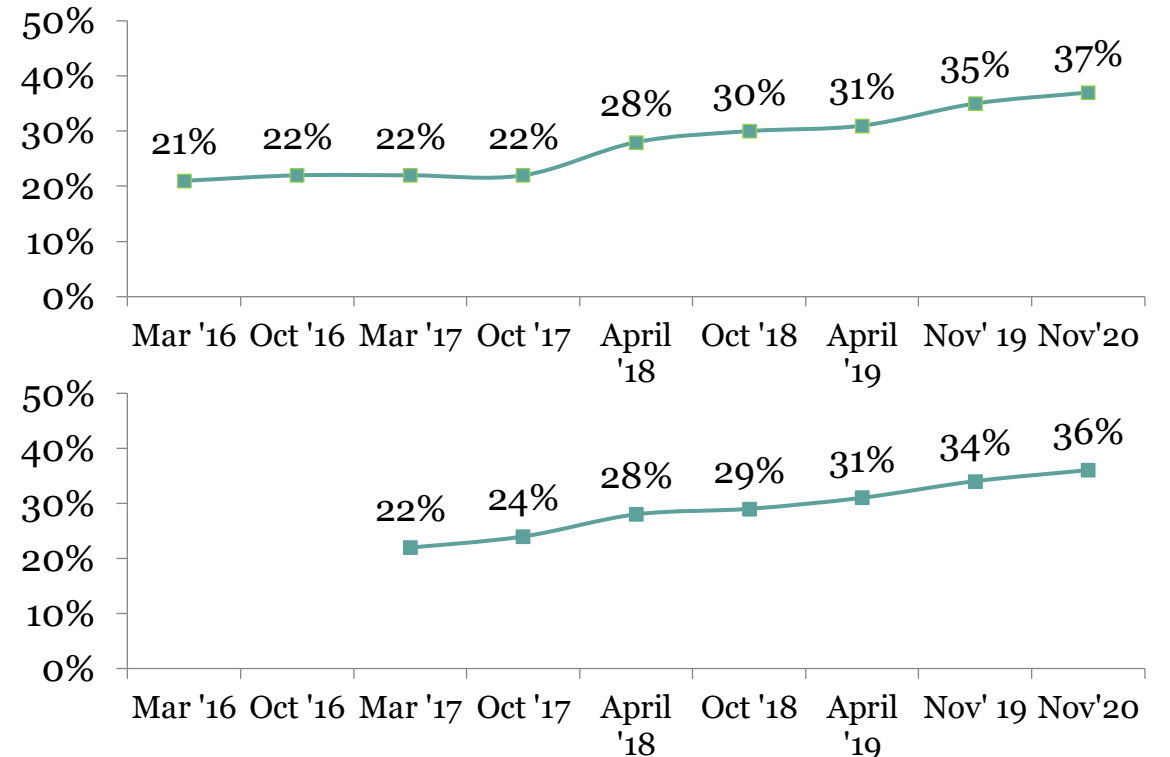
UK adults are more likely than ever before to say they think about the environmental impact when travelling by air, or that they would pay more to reduce the environmental impact of flying

Environmental attitudes

All respondents



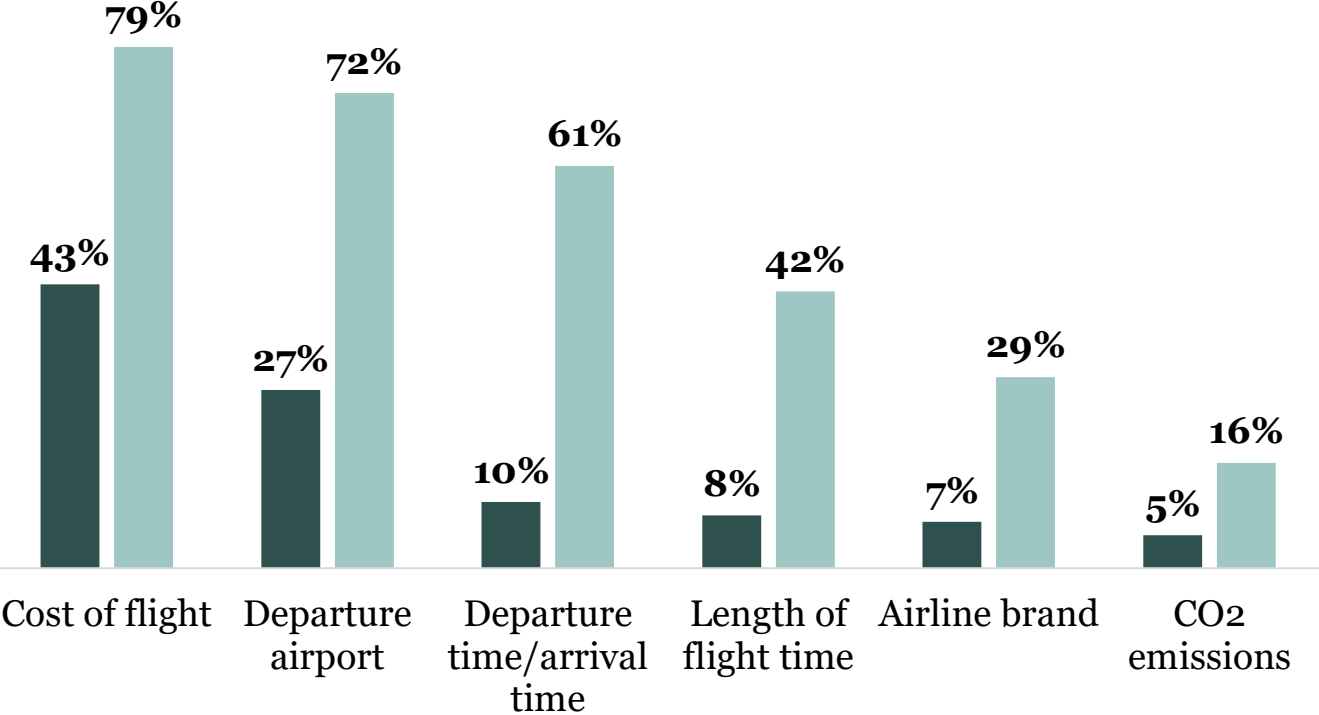
Environmental attitudes – NET: Agree over time



Cost of flight is the most important factor for many when choosing which flight to book, while just one in six rank CO2 emissions in their top 3 factors

Importance when choosing a flight to book

Showing Top and Top 3 ranks
■ Top 1 ■ Top 3



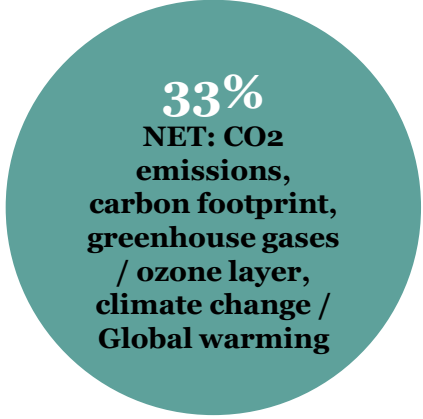
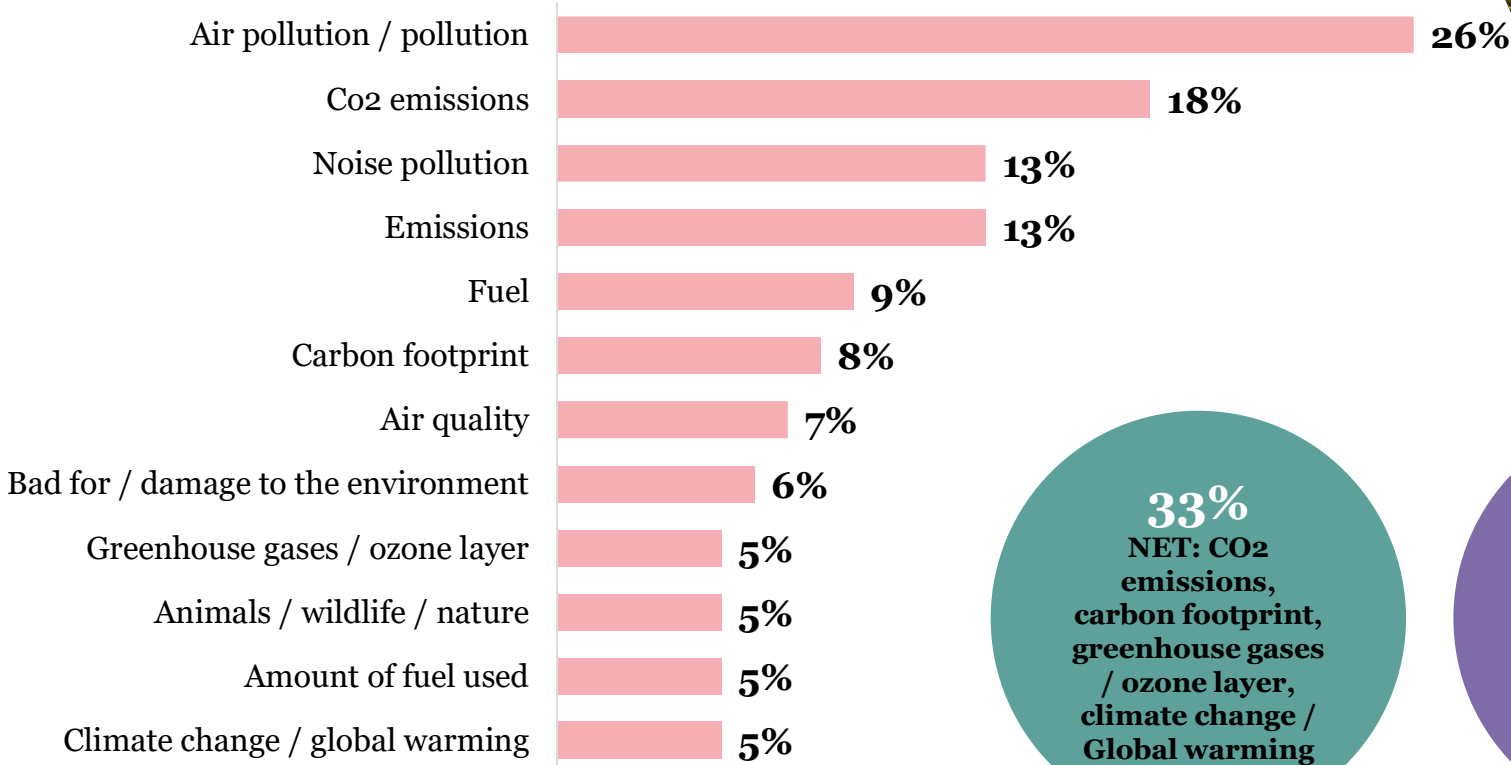
Four in five (79%) respondents rank cost of flight in their top three, with two in five (43%) placing it as their top factor when choosing a flight to book.

Just one in twenty (5%) say CO2 emissions are their top ranked factor, with one in six (16%) placing it in their top 3. However a quarter (27%) of those aged 18-34 place CO2 emissions in their top 3 ranked factors.

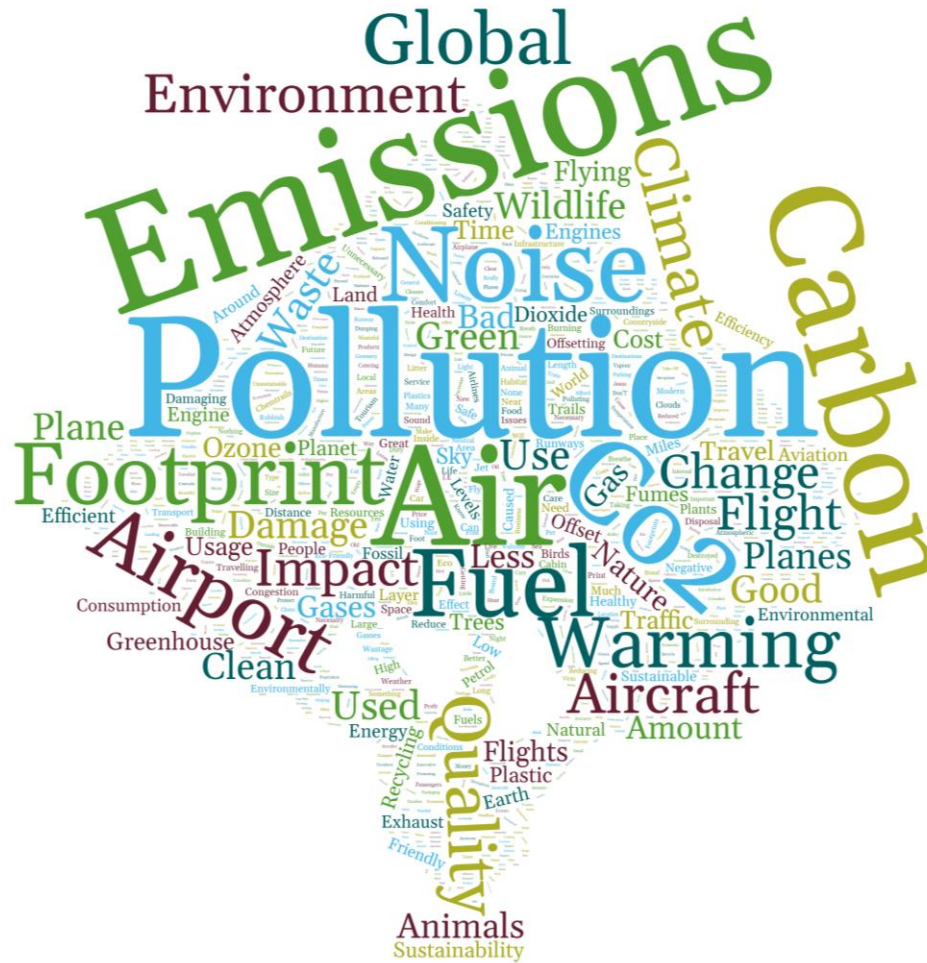
A quarter of respondents say the first thing they think of when they think of “environment” in the context of aviation is air pollution/pollution

Associations with environment in aviation

Showing responses mentioned in at least 5% of responses



Thoughts on the environment in the context of aviation highlight the prominence of negative effects



Many respondents think about the negative effects of aviation on the environment, with outputs such as emissions, pollution, carbon and noise taking centre stage.

By contrast, associations with efforts made to tackle these effects are not at the forefront. This highlights low levels of awareness among the public about what measures aviation is taking in the context of the environment.

Verbatim comments on ‘environment’ in the context of aviation

| 1 - Air pollution / pollution | 2 - CO2 emissions | =3 - Noise pollution | 5 - Fuel* |
|--|--|--|--|
| <p>“Pollution due to large number of vehicle movements in the area of the airport”</p> <p>“Air pollution from aircraft”</p> <p>“Atmospheric pollution”</p> | <p>“CO2 released into the atmosphere”</p> <p>“Offsetting CO2 emissions”</p> <p>“Carbon footprint of aircraft”</p> <p>“Reducing carbon emissions”</p> | <p>“Noise around the vicinity of the airport from jets”</p> <p>“Noise pollution”</p> <p>“Noise of old plane engines”</p> | <p>“Fuel jettison”</p> <p>“Fuel use whilst idling on stands and awaiting take-off”</p> <p>“Fuel used and impact on environment to produce that fuel”</p> |

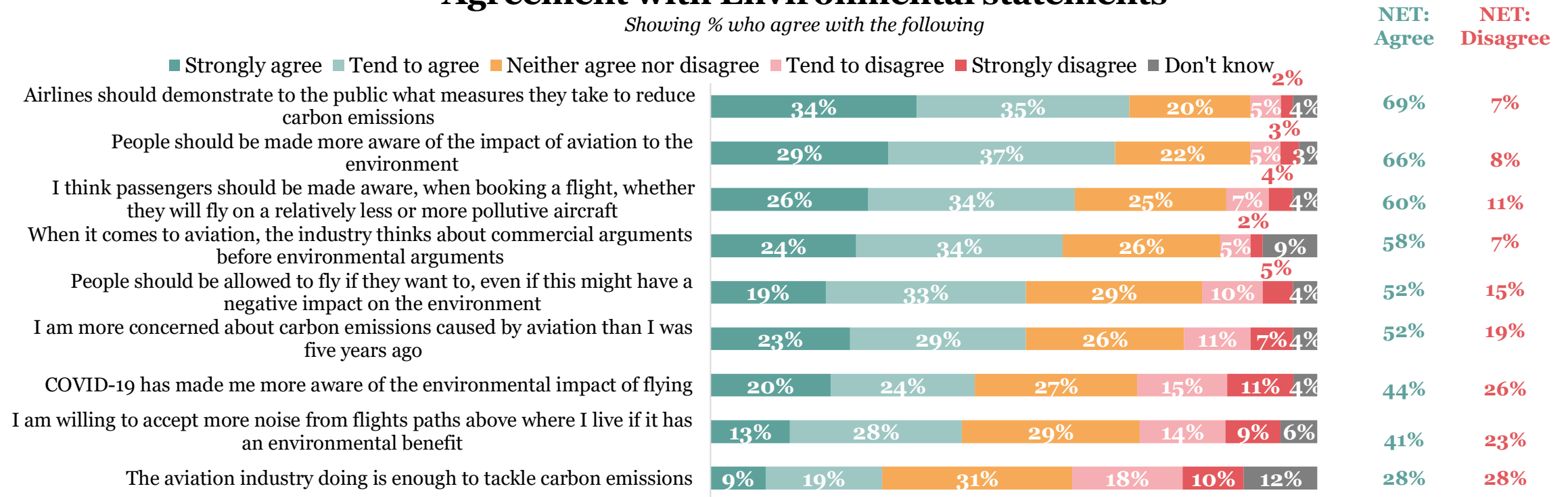
*Verbatim responses for those coded as answering ‘emissions’ (the joint 3rd highest answer) are not shown, as the vast majority of these respondents simply wrote ‘emissions’ as their answer.

Comments on CO2 emissions covered a range of topics, including general mentions of CO2 emissions as well as positive efforts by the aviation industry to combat these. Comments relating to noise pollution and fuel were almost entirely around their negative effects.

The majority of respondents want more environmental information, and to be shown by the airlines what they are doing to reduce aviation carbon emissions

Agreement with Environmental statements

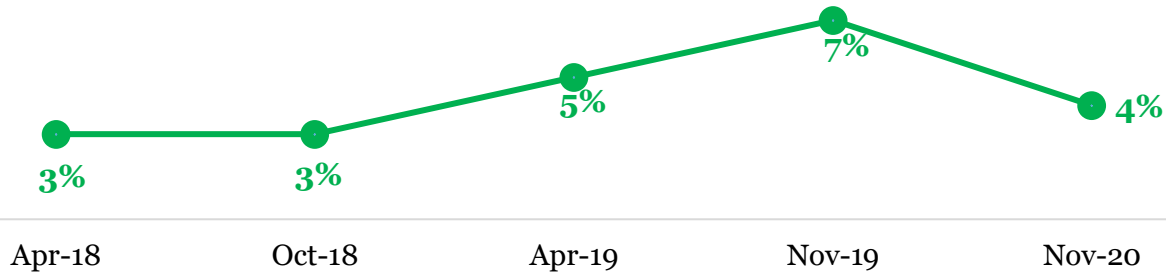
Showing % who agree with the following



Respondents are divided on whether the aviation industry is doing enough to tackle carbon emissions, with the same proportion agreeing and disagreeing (28%). UK adults appear to want more information on this, with seven in ten (69%) agreeing that airlines should demonstrate what measures they are taking and two thirds (66%) agreeing that people should be made more aware of the impact of aviation to the environment. A majority (52%) of respondents say they are more concerned about carbon emissions caused by aviation than they were 5 years ago.

The proportion of passengers not flying due to environmental concerns has dropped slightly since November 2019

Showing % of those who have not flown in the last 12 months because of concerns about the environment/carbon footprint



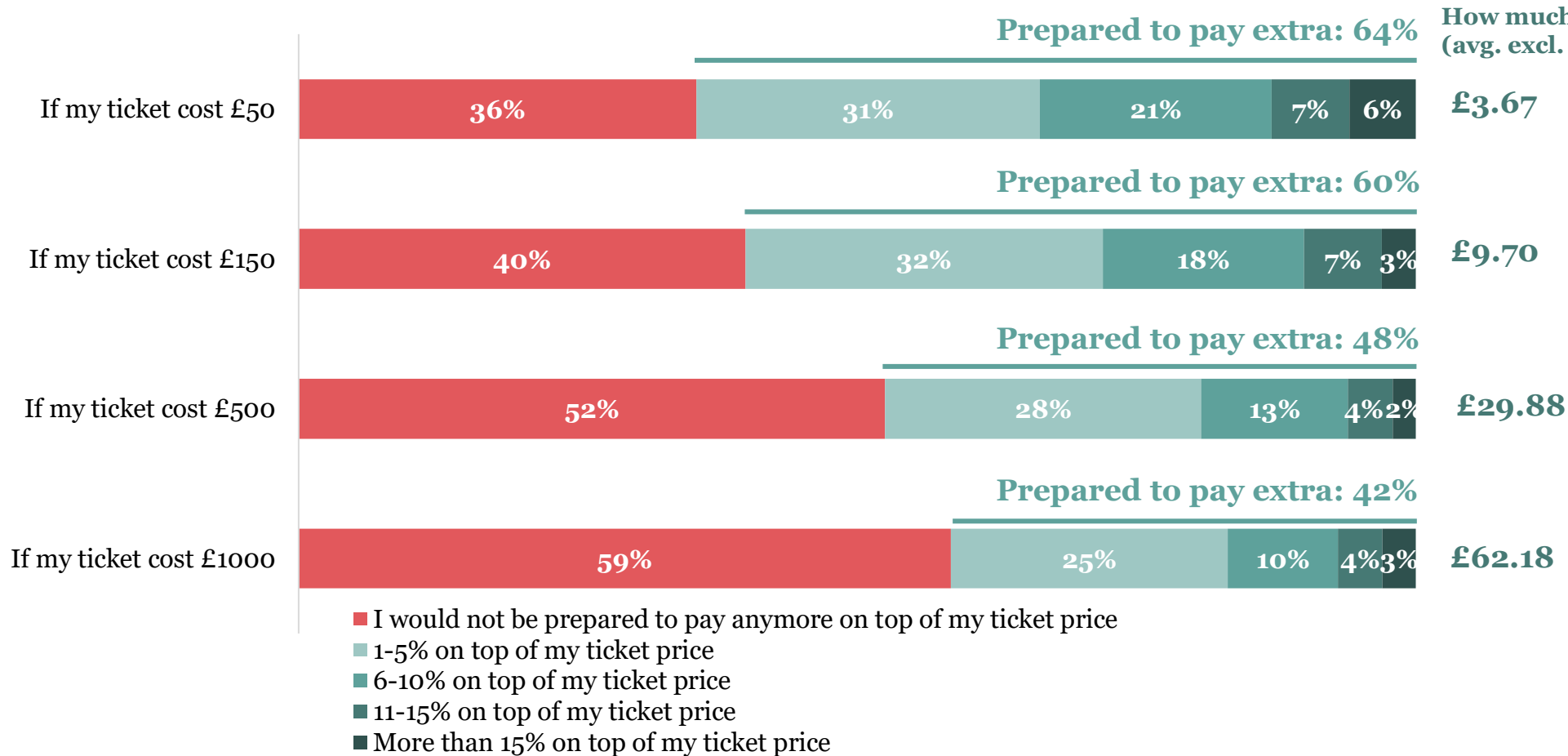
In wave 8 of the aviation tracker, 7% of respondents who had not flown in recent memory did so because of the environment or carbon footprint concerns. This figure has dropped since then, with this slight decrease potentially being attributable to the manifestation of fears about COVID-19, and the limitations placed on the public meaning many could not fly at all.



For tickets that cost up to £500, almost half say they would be willing to pay extra on top of their ticket price if a charge was levied to help tackle the environmental impact of flying

Willingness to pay extra to tackle climate change

Showing % who say the following



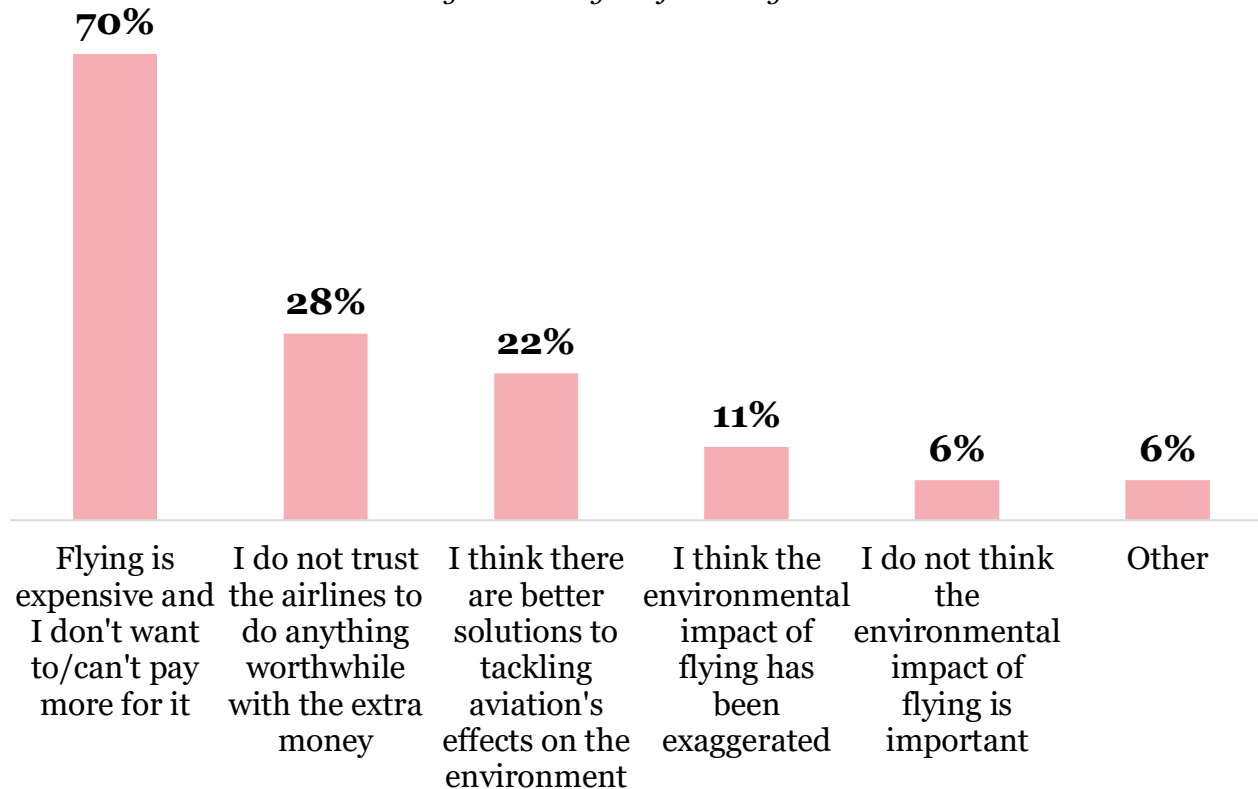
How much more?
(avg. excl. zero)

Two thirds (64%) of respondents say they would be willing to pay extra on top of their standard ticket price to help tackle the environmental impact of aviation if the ticket costs £50 or less. This proportion decreases to 42% if the ticket were to cost £1000 or more.

Of those who would not be willing to pay extra to fly, the main reason is that they consider flying to already be expensive and can't afford to pay extra

Reasons to not pay environmental levy

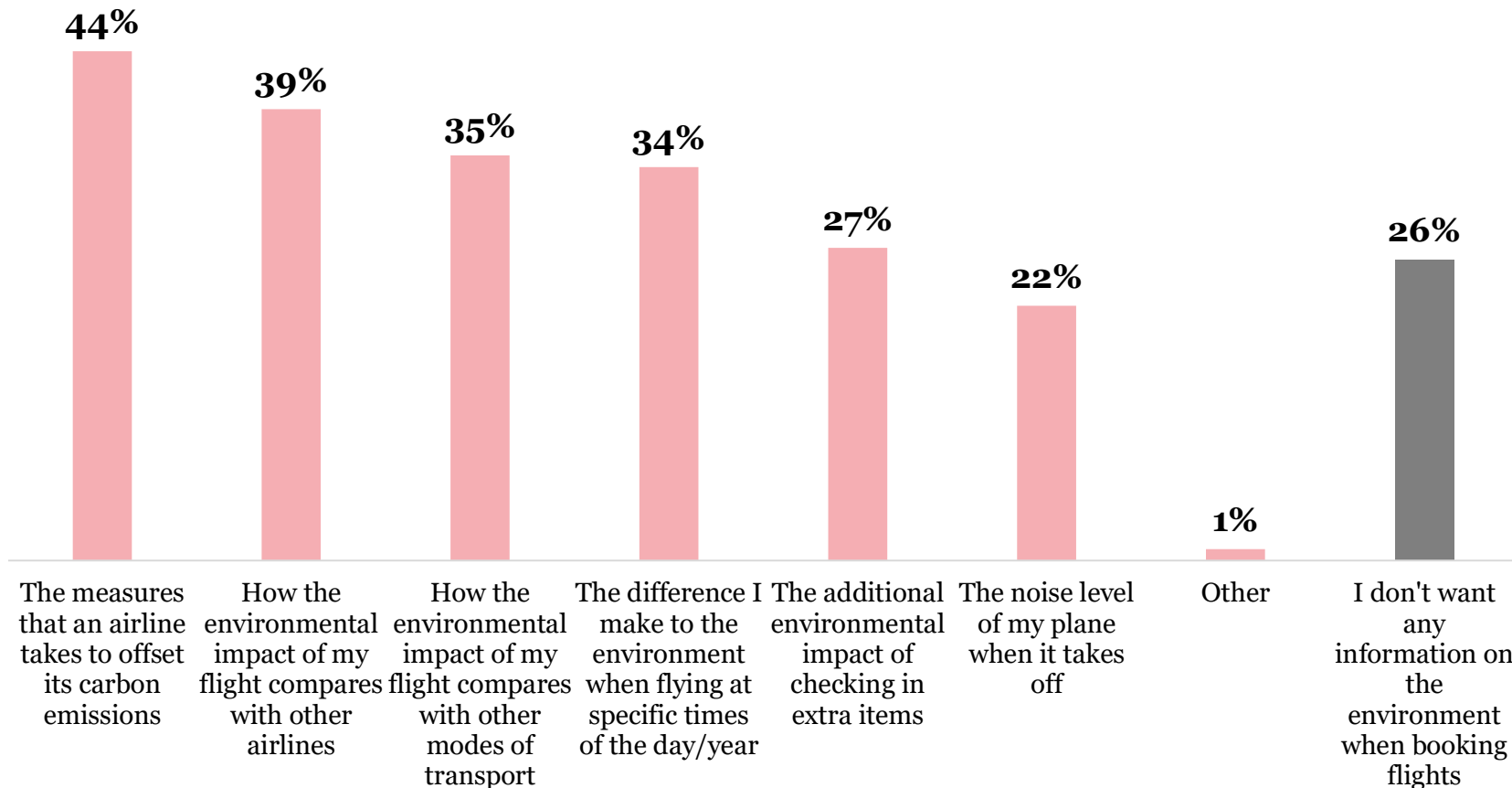
Showing % who say the following



Approaching half of respondents would like to see information about the measures that airlines take to offset their carbon emissions

Environmental information shown when booking a flight

Showing % who say the following



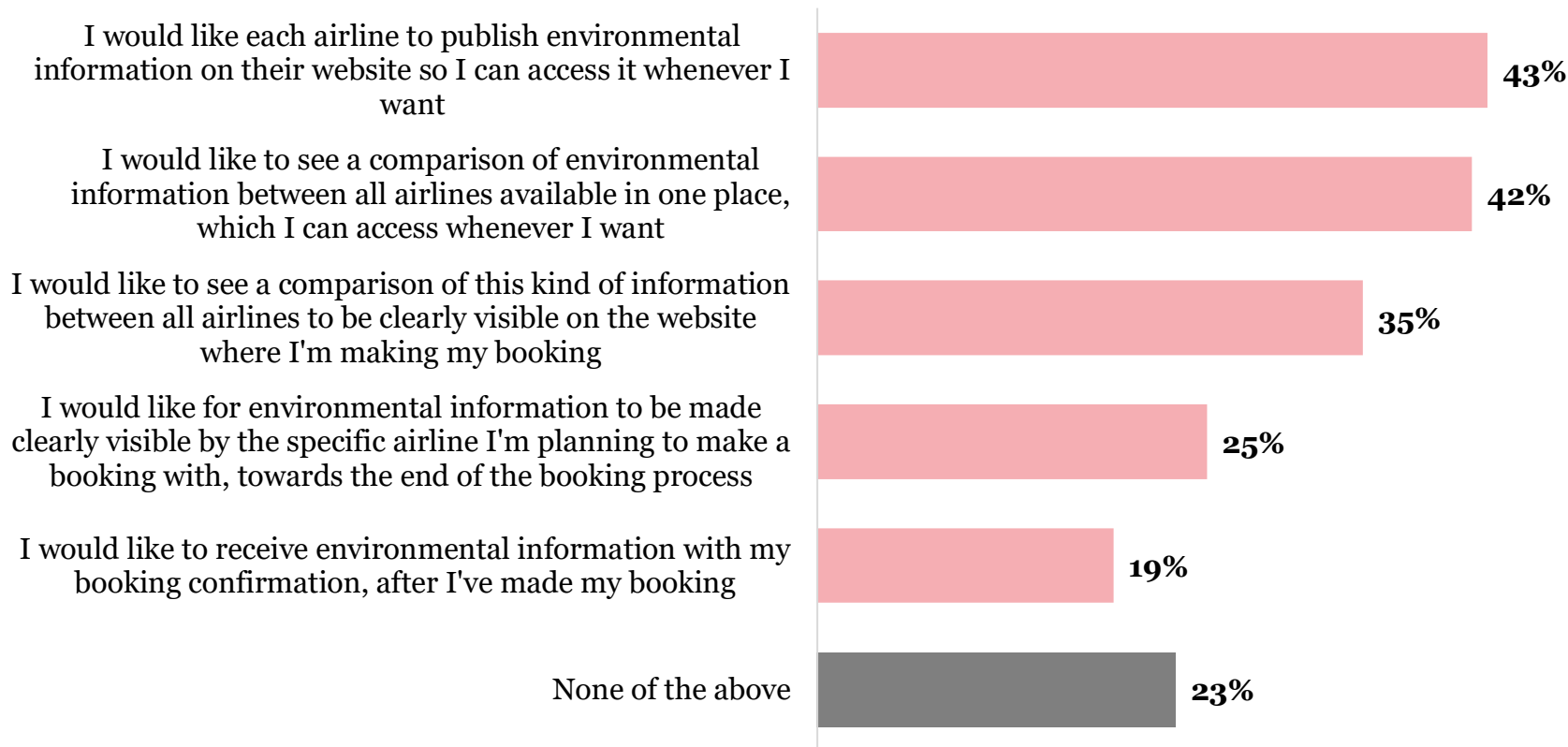
The majority (75%) of respondents would like to see multiple sources of environmental information when booking their flight.

Among the 25% of respondents who selected just one option, the information most desired is on the measures that an airline is taking to offset its carbon emissions (26%). This is followed by 'how the environmental impact of my flight compares with other modes of transport' and 'how the environmental impact of my flight compares with other airlines' (17% respectively).

Respondents are split between wanting each airline to individually publish environmental information and having it all in one place

Preference for environmental information when booking

Showing % who say the following



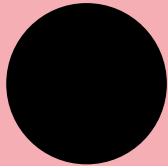
Approaching two thirds (63%) of respondents would like multiple ways to access environmental aviation information.

Two in five (43%) respondents say they would like each airline to publish environmental information on their site so they can access it when they want. A similar proportion (42%) say they want all the information in one place.

These are also the top two options among the 37% of respondents who selected only one option, (35% and 31% respectively).

Q43. If environmental information was available to you when booking flights, how would you like to access this information? Base: All respondents (n=3504)/ Q43. If environmental information was available to you when booking flights, how would you like to access this information? Base: All respondents who selected one option (n=1309)

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