



More in
Common

Europe Talks Flying

Navigating public opinion on aviation and climate

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Foreword

For both the public and policy makers in Europe the debate about climate change has moved on from *whether* to take action to reduce emissions to exactly *how* and *when*. While there is broad support for reducing emissions, specific policy interventions command varying levels of support in different countries. How our societies handle these debates about specific policy measures matters. It matters for how quickly and effectively we can reduce emissions, but it also matters for maintaining public support for and confidence in our ability to tackle climate change.

Drawing on polling of more than 12,000 people and focus groups in six countries, this report aims to help policymakers and campaigners working on reducing aviation emissions to better understand how the public navigates this challenge and how they approach the various policy options available. It also dives deeper into the public's upstream attitudes on aviation with a view to enabling policymakers to design policies that better reflect the public's priorities, and allowing campaigners to land their asks and messages more effectively.

This report finds one major opportunity and one major risk for efforts to reduce emissions in the aviation industry. Do this transition well - reflecting the public's values and priorities - and policymakers and campaigners can point to an example of how transition can be done effectively and fairly, starting with those who have the broadest shoulders. Do this transition badly and communicate it poorly and there is both the risk of undermining broader consensus on climate action, as well as setting back progress on aviation decarbonisation significantly.

This 'Europe Talks Flying' report is made up of five parts:

- *Part One* explores the public's starting points on flying and aviation across six European countries
- *Part Two* looks at what drives flying behaviour and attitudes to aviation across these countries
- *Part Three* examines how the public would reduce aviation emissions - at both the macro and micro policy level
- *Part Four* outlines recommendations for policymakers and campaigners in bringing the public on board with any policy changes
- *Part Five* includes specific country deep-dive analysis to understand the national picture on flying and aviation across the UK, France, Germany, Spain, Belgium and the Netherlands.

Research design and methodology

This report is the result of extensive mixed-methods research across six European countries. The countries were selected because they are among the most important European countries for the aviation industry, including aircraft manufacturing, airports and airlines (France, Germany, Spain and the UK) or currently have live political debates about airport capacity and environmental impacts (Belgium and the Netherlands). Qualitative fieldwork was conducted in November 2023, and quantitative fieldwork was conducted in December 2023. Throughout each stage of the research, a network of expert partners who specialise in aviation, climate or public opinion informed our research. The conclusions of this report remain the author's own.

Six countries

The research focused on evidence and fieldwork in six European countries:

-  Belgium
-  France
-  Germany
-  The Netherlands
-  Spain
-  UK

Please note occasionally this report refers to "Europeans" to describe citizens of these six countries. We hope that future research will help to understand opinions of Europeans in other countries.

12 focus groups

In each country one focus group of regular flyers and another focus group of non-flyers or infrequent flyers was conducted. These were mainly done separately, although were mixed in Belgium.

Evidence review

More in Common also conducted an evidence review which shaped the research, including an examination of grey literature, academic papers and secondary datasets

Cross-country polling

In each 2,000 person nationally representative poll, the following themes were explored:

- Flying behaviours
- Social norms
- Climate attitudes
- Perceptions of different pathways and technologies
- Perceptions of actors in the aviation industry
- Frequent flyer levy
- Private jets
- Train vs plane measures
- SAFs
- Country-specific topics

Acknowledgements

More in Common is grateful for the work and analysis done by [Our Common Home](#) as our research partners for this project and lead research, analysis and dissemination partner in Germany, France and Spain.

More in Common appreciates the input of the main civil society organisations who have helped shape the design and analysis of this research.

This research has also been supported by an expert advisory group:

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- Prof. Stefan Gössling (Western Norway Research Institute)
- Dr Debbie Hopkins (Oxford University)
- Chris Lyle (Tourism Panel on Climate Change)
- Dr Giulio Mattioli (TU Dortmund University)
- Luisa Melloh (Climate Outreach)
- Dr Steve Westlake (Cardiff University)

We are grateful for their time and expertise in shaping this research.

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More in Common has retained editorial independence throughout this work and the work here reflects the views of the author alone.

Executive Summary

Key Insights

Most people like flying and would fly more if the cost was not a barrier. Half of the public in the European countries tested say they would fly more if money and time were not issues.

While many think practically about flying, their response to potential curbs to flying is often more emotional than it is practical.

Most want airlines to take climate change seriously, but don't trust them to do a good job. The public across Europe are more than six times more likely to think that airlines should be doing more to reduce their environmental impact (44 per cent) than those who think they do too much (7 per cent). In all countries, more people say they don't trust airlines to tell the truth on their environmental impact than those who say they do trust them.

Flight shame is a minority, not majority, view. While both flyers and non-flyers across Europe are worried about climate change, climate concerns do not shape people's flying behaviour, and only around one in four people disapprove of others flying frequently. This is perhaps shaped by the fact that many are not even aware of the more negative environmental impact of flying compared to other forms of transport.

Age and income, rather than concern about climate change, drive flying behaviour. In all the countries, age and personal income play a far bigger role than concern about climate change in explaining variations in flying behaviour. Other demographic factors such as having family abroad also impact both behaviour and attitudes on aviation.

Key Insights

Most Europeans are not convinced that aviation drives economic growth. Few people believe that aviation growth is essential to economic growth – though many acknowledge it makes an important economic contribution. Across each country, people are significantly more likely to say that the economy can grow without people flying more and, although there is a significant gap, this opinion is held by flyers as well as non-flyers.

The public want flyers and airlines to pay for decarbonising aviation, but think that those with the broadest shoulders should bare the largest costs. The public also think that the cost of a green transition in aviation should be met by the aviation industry, rather than from public spending.

The public are optimistic about a ‘technology-first’ approach to reducing aviation emissions. However, high trust in technological solutions reflects low trust in government and business ability to handle change. Trust in technological solutions also varies significantly by type of technology.

Tackling private jet usage and promoting train-to-plane policies are the clear first steps for any aviation policy wanting to command public support. A majority in all countries think the government should be encouraging people to take trains instead of planes, and there is strong support for action to either tax or ban private jets. While these policies might not make the most difference in reducing overall aviation emissions, they can signal a policy approach that can meet the public’s expectations.

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The policy challenge on aviation and climate

The policy context and challenge

The ability to fly around the world is one of the many marvels of modern technology. For the last 50 years people from all backgrounds in higher income countries have been able to fly much more frequently to many more places and at much lower prices than ever before, but these benefits haven't been shared equally across the board, and the growth in flying has come at a cost to the planet.

Aviation is now responsible for about 3.5 per cent of global warming (Gossling and Lyle 2021). Tackling climate change means that greenhouse gas emissions and other radiative forcing from aviation will need to shrink dramatically in the next thirty years, especially given airlines are currently forecasting that air transport demand may triple by 2050 (Gossling and Humpe 2023).

The aviation sector will reach its carbon budget for 2 degrees of warming within 29 years if it keeps polluting at its current rate (ibid.). But there is no immediate answer for precisely how the industry should go about bringing its emissions to net zero, while the evidence shows that the need to decarbonise aviation remains urgent.

On the supply side, there have been significant technological advances in the fuel-efficiency of aircraft since commercial aviation took off. In the last thirty years the emissions intensity of flying has halved, mostly due to market pressures on airlines to reduce their fuel costs. In turn, this has meant lower prices for passengers and lower costs for airlines (enabling fleet expansion), causing demand to quadruple and total emissions from aviation to effectively double (Richie 2023).

This “Jevons paradox” in aviation means that, while future advances in fuel efficiency will likely decrease the per-mile emissions from flying, the net result of this without further intervention is likely to be more flying and higher overall emissions rather than less.

There has also been excitement around other technological possibilities for decarbonising aviation. In recent months, for example, there was much coverage around the first “sustainably fueled” transatlantic flight from an industry consortium led by Virgin Atlantic.

While these “sustainable aviation fuels” (“SAFs”) can decrease the net CO₂ emissions from an aircraft, a wholesale transition to biogenic SAFs would mean a significant transition of cropland away from food production towards fuel production, and would not reduce gross CO₂ emissions at the aircraft level because emissions savings come from growing crops to produce the fuel.

E-fuels, made of green hydrogen and captured carbon, could deliver greater emissions reduction benefits than biogenic SAFs, but would place huge demands on an electricity grid already under pressure to rapidly phase out fossil fuels. Hydrogen is a more promising candidate for truly decarbonised aviation, but only in the longer term because it requires new infrastructure at airports and new types of planes. By the time the technology is fully developed, the aviation industry will need to have already undergone significant changes if it is to remain within its carbon budget (Gossling and Humpe 2023).

Government policy can help incentivise innovation on the supply-side to decrease aviation emissions, but most pathways to a fully decarbonised aviation industry include some form of demand-side measures. In Western Europe, commercial flying for leisure is popular with the public, even if concern about climate change is high - making many demand-side policies politically difficult to implement.

If designed and communicated poorly, policies designed to stabilise air traffic levels could cause significant backlash - jeopardising not only our ability to decarbonise aviation, but poisoning the water for well-intentioned policies to decarbonise other parts of our economy.

However, this research identifies opportunities for policymakers and campaigners to work towards reducing aviation emissions by working with the grain of public opinion. The public in the UK, Germany, France, Spain, Belgium and the Netherlands wants to see significant government intervention on climate change - including on aviation - but how this is done really matters.

A blanket approach to scaling-down aviation that does not consider the needs and concerns of specific groups is not likely to be successful and could actively harm attempts to make meaningful progress. This research attempts to identify the approaches that could be far more effective, focusing on both carrots and sticks, and working with the grain of public opinion for initial policy development.

Part 1

**What does Europe
think about flying?**

Most people like flying

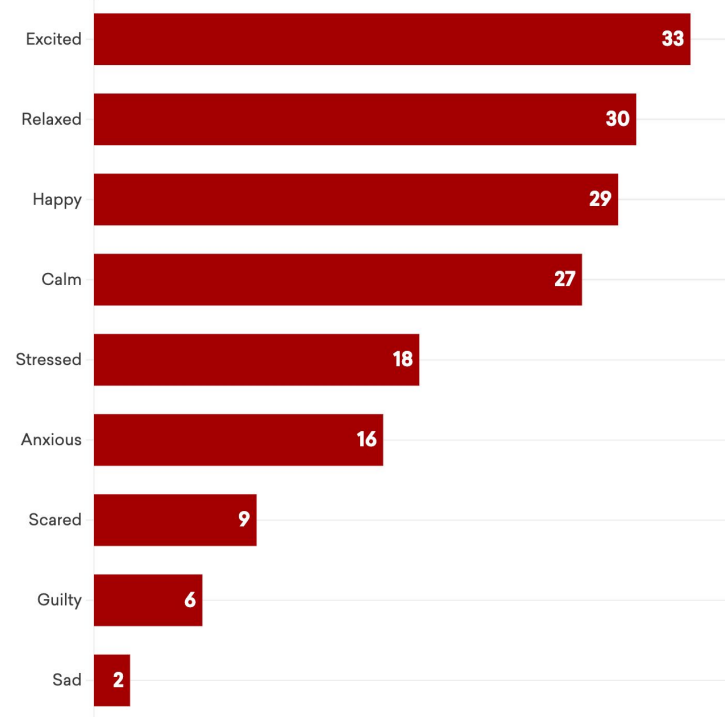
Asked how they feel when they fly, people say “excited”, “happy”, and “calm” more than anything else. In focus groups with regular flyers almost everyone has stories to tell of the exciting places that flying has opened up to them and the positive experiences they have had on international holidays or visiting family and friends abroad. While many were indifferent about the experience of flying itself, all had positive memories of flying.

Even non-flyers are positive about flying. The main barrier to flying is cost. The actual number of people who have stopped flying out of environmental concern is low (6 per cent across the six countries tested).

While focus group participants who fly semi-regularly were proud of the efforts they had made elsewhere in their lives to reduce their carbon footprint, for many, their aviation habits were something that they were not willing to cut.

"I like to fly for leisure and this year I have already made five trips and I don't think about the environment, and I don't care what others think. I have to take advantage now that I'm 29 years old and judge me if you want, but nobody is going to take my hobby away from me..." (Spain).

**When you fly, which of the following words best describe how you feel?
Select all that apply.**



Flying is emotional as much as it is practical

If you didn't fly for the next five years, which of the following do you think would have the most significant negative impact on your life? Select up to three.



"I was so happy that I could fly again after Covid. I really felt locked up, not able to see and meet my foreign friends. Now I try to catch up as much as possible. My hobby is travelling and I am prepared to pay for it." (Belgium).

While many fly for practical reasons, people are much more likely to talk about their emotional responses when discussing flying or policies relating to decarbonising aviation.

Given this, a test for policies on aviation is not just to make sure that people's practical concerns are addressed, but whether they can acknowledge the public's emotional attachment to flying in the policy design as well.

When asked about the negative impacts of stopping flying, the top concerns that people have are not related to practical impacts on day-to-day life. Rather, they are about restrictions on less tangible aspirations, such as the ability to visit parts of the world they've always dreamt of visiting, or losing the opportunity to experience other cultures.

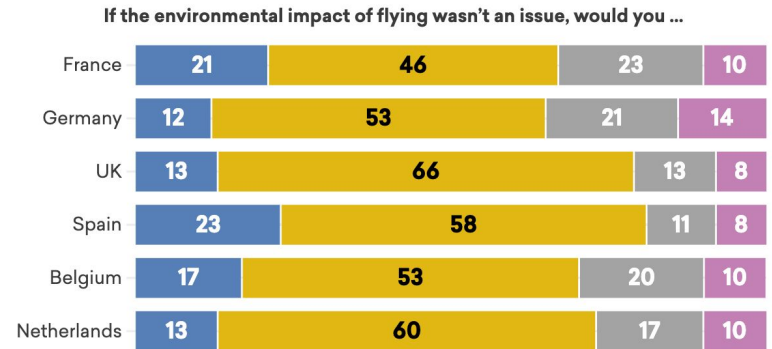
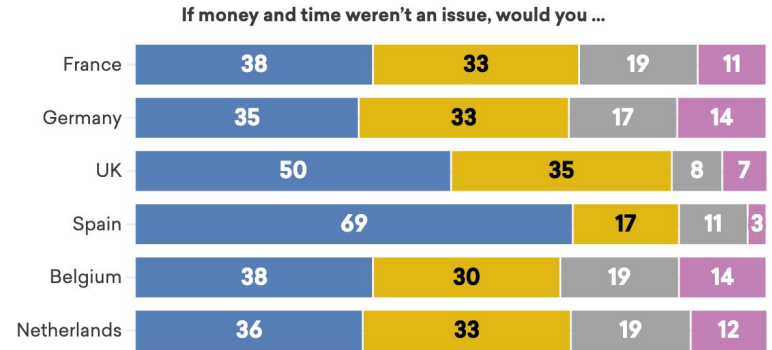
Currently, people don't identify such emotional benefits of stopping flying. When asked about the positive impacts of not flying, the most commonly selected answer is about saving money.

Europeans would fly more if they could

People would like to fly much more if money and time were not an issue - 44 per cent of people say they would fly more (and 30 per cent the same amount). For most Europeans, cost is a much more serious barrier to flying than environmental concern. Despite the environmental impact of flying, it makes no difference to how much most people would fly.

This backs up a range of existing studies showing that the impact of “flight shame” in Europe has been extremely limited (Gossling, Humpe and Bausch 2020). Our research shows that concern about climate change is high across Europe (with two thirds of people in the six countries saying they are “worried” or “very worried” about climate change) - but climate concern is only weakly correlated with flying behaviour. The implications for campaigners and policymakers are clear: do not assume that everyone is deeply concerned about the environmental impact of their own flights, even if they are worried about climate change in general.

Strategies based on associating flying with guilt carry risk and could trigger public backlash. Instead of unlocking a minority of individual’s own feelings of shame about flying, it risks turning into an exercise where individuals are shaming others about flying and distracting the focus from a wider framework on how the aviation industry can reduce its emissions.



● Fly more often ● Fly the same amount ● Don't know ● Fly less often

Flying shame is a minority, not majority, view

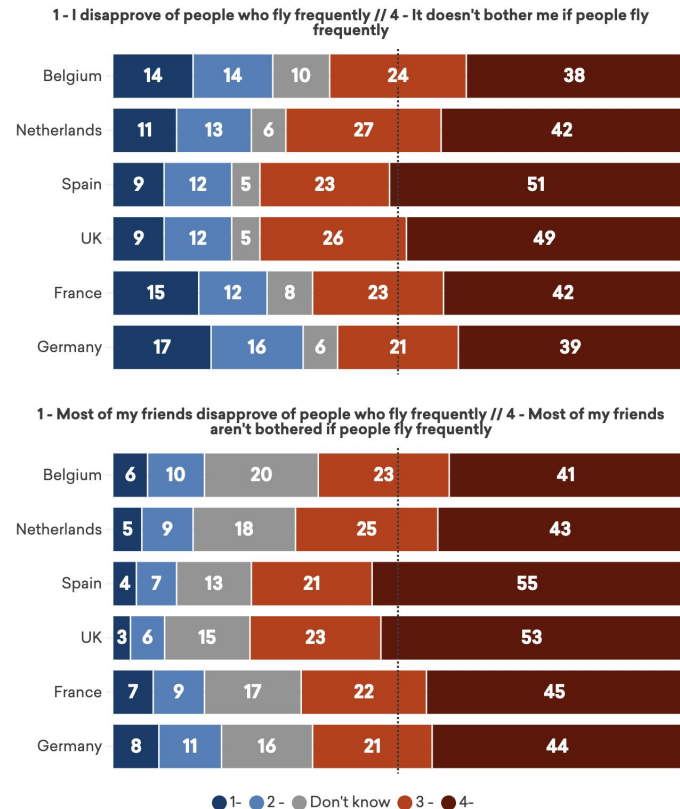
Just as people don't put much thought into the environmental impact of their own flights, they are unlikely to judge others for their frequent flying behaviour.

A majority of people in the six countries tested say they are not bothered if people fly frequently and, crucially for detecting social norms around frequent flying, more than 69 per cent say that their friends are not bothered about others flying behaviour either. These numbers are even higher among those who fly frequently.

Where there is "flight shame" in Europe, it is concentrated among a small minority rather than being a mainstream opinion. In some countries, such as Germany, one in three people (33 per cent) say they disapprove of those who fly frequently, while in the UK only one in five (21 per cent) hold the same view. In all countries, most people aren't bothered by frequent flying.

The gap between those who disapprove of frequent flyers (on average one in four people) and those who say their friends disapprove of frequent flyers (on average one in seven people) suggests that personal disapproval has not fully translated into wider social norms. There is risk that relying on social shaming as a campaigning technique could alienate rather than animate the groups that most need to be reached.

"I know it's not exactly good for the environment, but I've never actively looked into it." (Germany)



Many flyers can imagine a world without flying

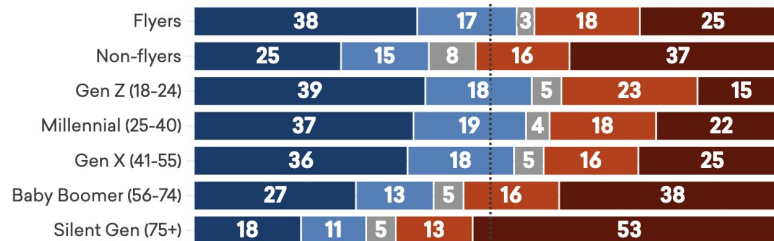
In spite of this enthusiasm for flying, there is no sense that people see travelling by plane as essential to live life to the full.

While many Europeans enjoy flying to go on holiday, the vast majority believe that you can have a real holiday without flying. Likewise, people across Europe think that it is possible to have a rich and varied life without travelling to other countries.

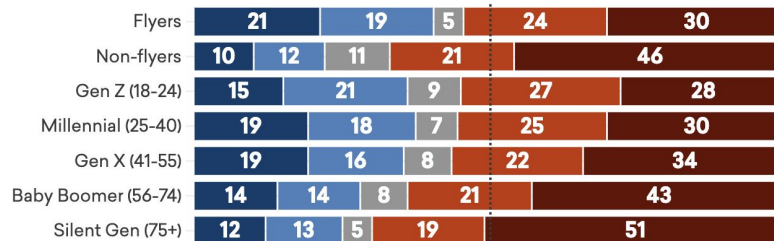
There is, however, some important variation within Europe when it comes to the sense that flying is essential. People who have flown in the last three years, for example, are much more likely to see flying as essential to a full life, and much less likely to be satisfied with the amount of travel they have done.

In the UK and Spain, people are much more likely (37 per cent/39 per cent) than those in the other countries (24 per cent to 30 per cent) to think that living a full life requires travelling beyond the country's borders. Younger people across all six countries are significantly more likely to say that they are not satisfied with the amount of travelling they have done, that a real holiday requires flying, and that international travel is essential to a full life.

1. I wish I had travelled to more places // 4. I am generally happy with the amount of travelling I have done



1. To have a rich and varied life, one needs to travel beyond my country // 4. It is possible to live a rich and varied life in my country without travelling further afield



1. A real holiday is when you fly // 4. You can have a real holiday without flying



● 1- ● 2- ● Don't know ● 3- ● 4-

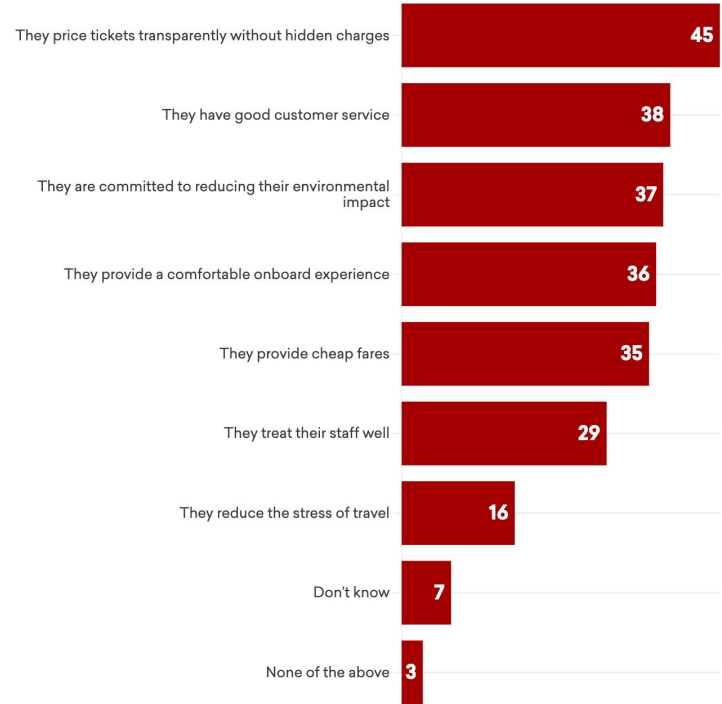
Europeans want airlines to take climate change seriously

From both qualitative and quantitative research we know that Europeans' main concern with airlines is confusing and opaque pricing schemes.

But the public also want airlines to show that they are committed to reducing their environmental impact - something that matters more to them than a comfortable onboard experience, cheap ticket pricing, or reducing the stress of travel. While there is clear demand for airlines to make meaningful progress on their environmental impact, few airlines are trusted to tell the truth about their environmental impact.

There are opportunities for cross-over with other campaigning and policy interventions that tap into this expectation for airlines to both treat their passengers better and do more to reduce their environmental impact. For example, current European policy work aiming to end hidden charges on hand baggage is an example of where airlines are being held accountable by policy makers and there are consumer benefits in the public being more aware of any hidden charges. This broader frame can be developed further to promote airlines' accountability for their environmental impacts.

In your opinion, which of the following are the most important features of a good airline? Select up to three.



Flyers and non-flyers worry about climate change

Across every country tested, most people say they are worried about climate change. Overall, levels of worry are similar between flyers and non-flyers, but non-flyers are more likely than flyers to say they are “very” worried (32 per cent versus 27 per cent), and flyers are more likely than non-flyers to say they are “somewhat” worried (41 per cent versus 35 per cent).

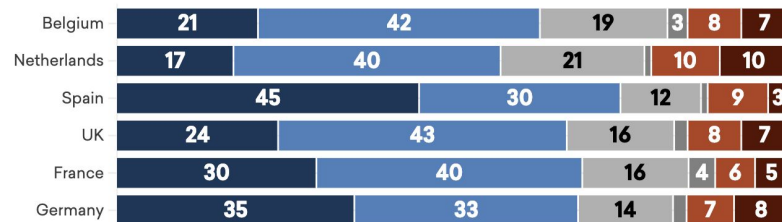
At the same time, the public tend to think that airlines are not doing enough on climate change, with very few thinking that they are doing too much - although the Spanish are notably more favourable about airlines across a series of questions tested.

This disconnect between high concern about climate change but low willingness to change flying behaviour is driven - in part - by low awareness of the climate impacts of flying.

Awareness is one key pillar of behaviour change, but given the strong emotional attachment to flying, it is not likely that awareness alone will be sufficient to shift the public’s behaviour and cognitive dissonance effects on flying behaviour are likely to take place once the public are aware of the environmental impact.

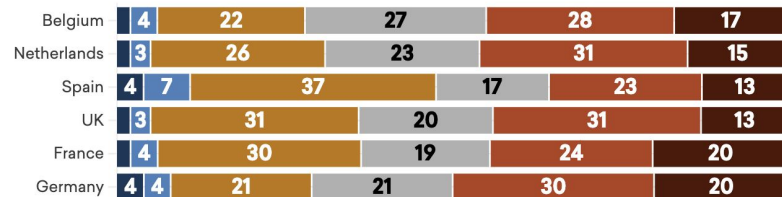
How worried are you about climate change?

Very worried (dark blue), Somewhat worried (medium blue), Neither worried not unworried (grey), Don't know (light grey), Somewhat unworried (orange), Very unworried (dark orange)



In general, do you think that airlines are doing too much, not doing enough, or doing about the right amount to reduce their impact on the environment?

Doing far too much (dark blue), Doing too much (medium blue), Doing about the right amount (orange), Don't know enough to say (grey), Doing too little (dark orange), Doing far too little (dark brown)



Few are aware of flying's environmental impact

While there is general awareness that flying is worse for the environment than other forms of transport, many people do not appreciate how much worse flying is, and there is a significant number of people who are not at all aware that flying is worse for the environment than taking the train.

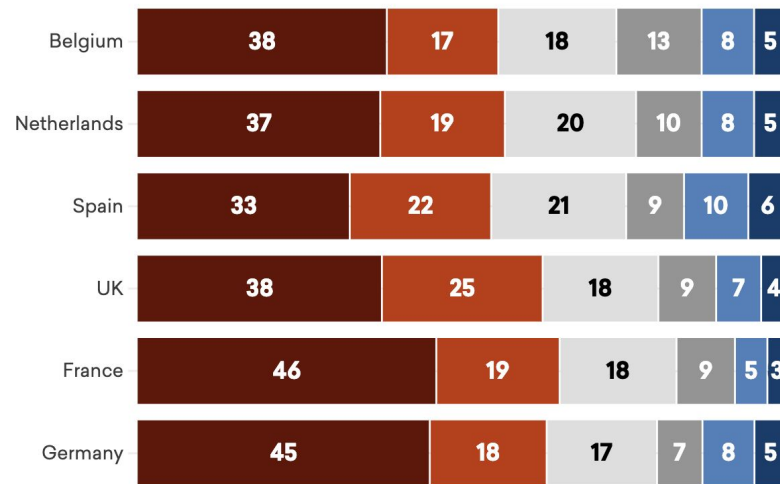
Across the six countries, only three in five (60 per cent) identified that flying is worse for the environment than travelling similar distances by train, and only 40 per cent knew that it is much worse.

Germany and France are the most informed on the environmental impacts of flying, compared to train travel. Younger people and those who have flown in the last three years are significantly less likely to say that flying is much worse for the environment than travelling by train: across the six countries, 60 per cent know that flying is worse, but it is lower for flyers (56 per cent) and 18-30 year olds (50 per cent).

In focus groups, it was common to hear explanations that flying more couldn't be that bad for the planet because planes are now often full of passengers and there is little wastage. Other participants commented that tickets going paperless is likely to make flying substantially greener.

Compared to travelling similar distances by train, do you think flying is...

- Much worse for the environment
- Slightly worse for the environment
- Slightly better for the environment
- Much better for the environment
- Neither better nor worse for the environment
- Don't know



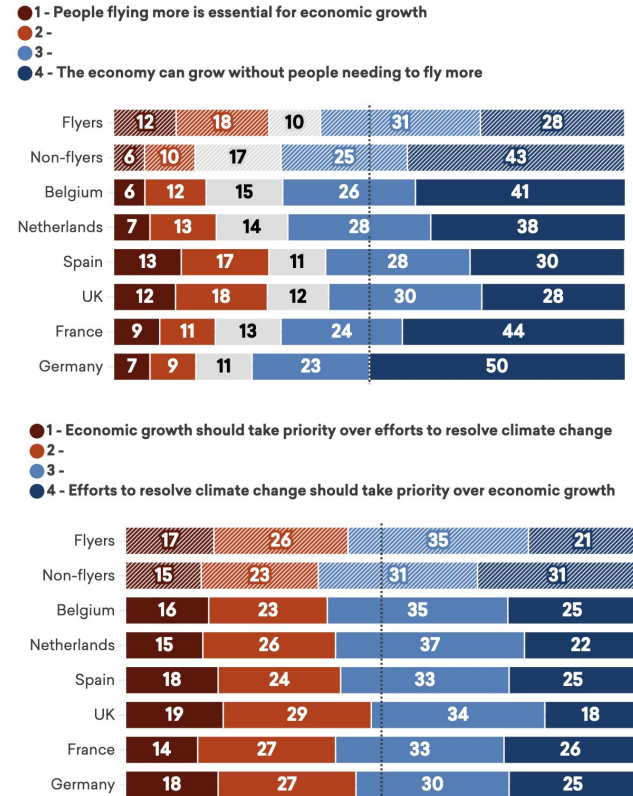
Most don't view aviation growth as essential for economic growth

Just as people do not tend to think that flying is essential to living a full life, few people believe that aviation growth is essential to economic growth – though many acknowledge it makes an important economic contribution.

Across each country, people are significantly more likely to say that the economy can grow without people flying more and, although there is a significant gap, this opinion is held by flyers as well as non-flyers.

Perhaps more importantly, the public thinks that efforts to resolve climate change should take priority over economic growth - a view that is also held by flyers and non-flyers. This view is most strongly held in France, the Netherlands and Belgium, but is shared across each of the six countries.

Within the countries, there are some important ideological differences - further explored in the part five of this report. For example in the UK, this view is held by three out of seven segments. This is to be expected given that varying worldviews shape the extent to which individuals prioritise economic growth. It remains the case though, notwithstanding the differences at the national level, that prioritising climate action trumps economic growth in each of these countries.

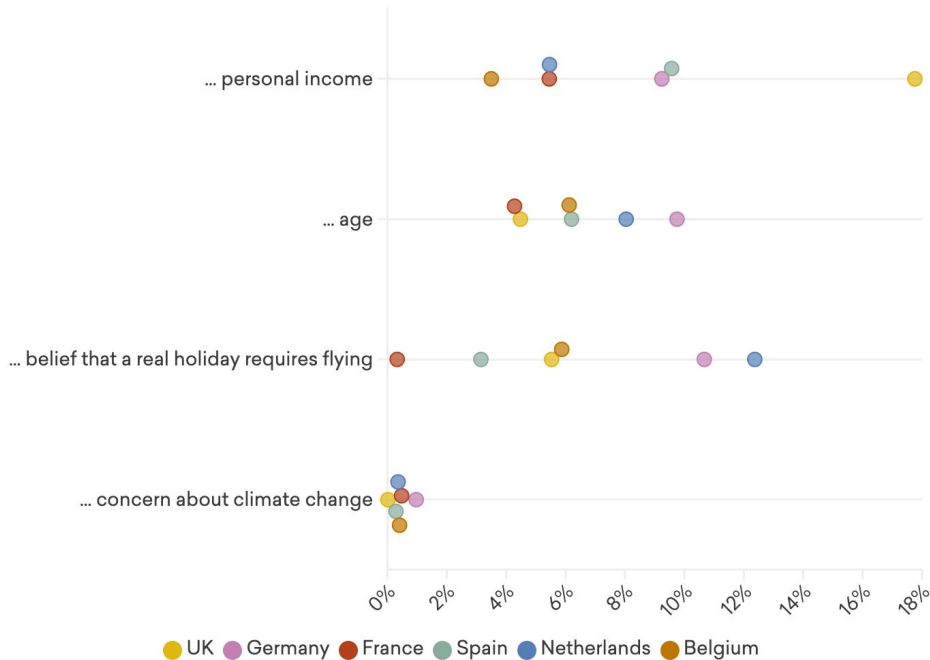


Part 2

What drives flying behaviour and attitudes to aviation?

Age and income, not social norms or concern about climate change, impact flying behaviour

Proportion of variation in flying behaviour explained by...



Based on univariate regression against modelled return flights last year

Our regression analysis on return flights in the last year shows the extent to which a range of factors (income, age, belief that real holidays require flights, and concern about climate change) can describe variation in actual flying behaviour.

In all the countries, age and personal income play a more significant role than concern about climate change. For example, in the UK (the most price-sensitive of these countries), differences in personal income explain about 18 per cent of variation in flying behaviour, whereas concern about climate change explains less than 1 per cent.

All of this suggests that a “flight shame” voluntary behaviour-change based approach is unlikely to have any meaningful impact.

Those who are very or somewhat concerned about climate change fly no more or less frequently than those who are not concerned at all.

How does flying behaviour shape attitudes to aviation?

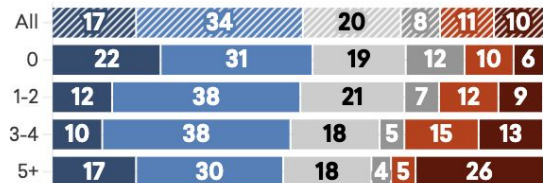
Flying behaviour has a significant impact on attitudes to aviation policy - though the effect depends on the type of behaviour:

Frequent flyers

Not surprisingly, people who fly the most frequently are most opposed to policies like a frequent flyer levy. However, there are significant numbers of non-flyers who are also opposed to this policy - and the proportion of people who support the policy is fairly stable across groups.

In general, do you think a frequent flyer levy is a:

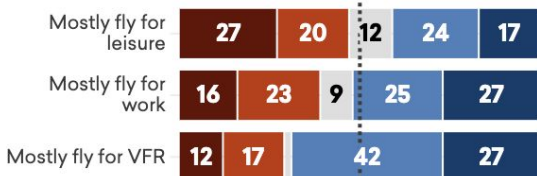
- Very fair policy
- Somewhat fair policy
- Neither fair nor unfair policy
- Don't know
- Somewhat unfair policy
- Very unfair policy



Business / Leisure / VFR travel

Leisure travellers have very different views to those who travel for business or VFR (visiting friends and relatives). In particular, this relates to ideas that flying is *necessary*. In qualitative research, those flying for VFR or business reasons were most likely to feel that frequent flyer levy proposals didn't consider their specific needs.

- 1 - Most frequent fliers could cut down their flights if they wanted to
- Don't know
- 4 - Most frequent fliers have to fly as part of their lifestyle or profession

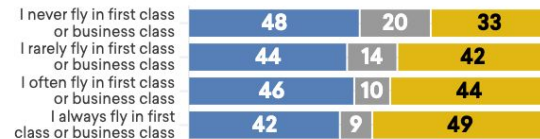


Business-class and first-class flyers

People who fly in first and business class are more opposed to restrictions on flyers than people who fly economy class - even when you take flight frequency into account.

If the government wanted to limit the total overall number of flights being taken, in order to reduce the environmental impact from flying, which of the following comes closest to your view?

- Government efforts should focus on those who fly the most
- Don't know
- Government efforts should focus on all flyers equally

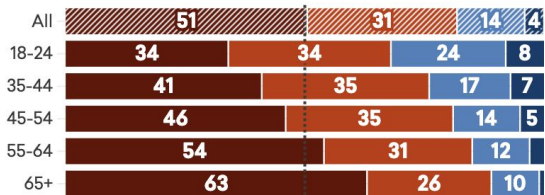


How do demographics shape aviation attitudes?

Different demographics (age, country and family situation) also shape attitudes to aviation:

Age

Younger people across Europe fly much more frequently than their older counterparts. They are also much more positive about flying in general - for example, they are more likely to say that a real holiday requires flying or that stopping flying would negatively impact their mental health.

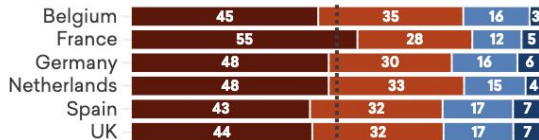


How many return flights have you taken in the last year?



Country

There is some variation in flying behaviour by country - with Spain and the UK containing the most frequent flyers and France containing the most non-flyers and infrequent flyers. This has some impact on attitudes - for example Spanish people are consistently the most opposed to regulations that would restrict flying. The largest group in each country are those who haven't flown in the past year.

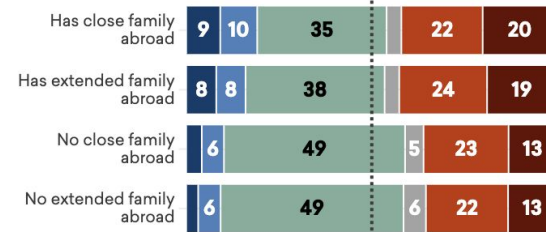


How many return flights have you taken in the last year?

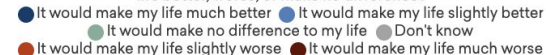


Family situation

Those with family members living abroad are much more likely to say that stopping flying would make their life worse, and are more opposed to action on frequent flyers and related policies. However, a majority of them still say that stopping flying would have a positive or neutral effect on their lives.



If you were to take no flights for the next three years, would that make your life better, worse, or make no difference?



Part 3

How would the public reduce aviation emissions

Starting points

A technology-first approach

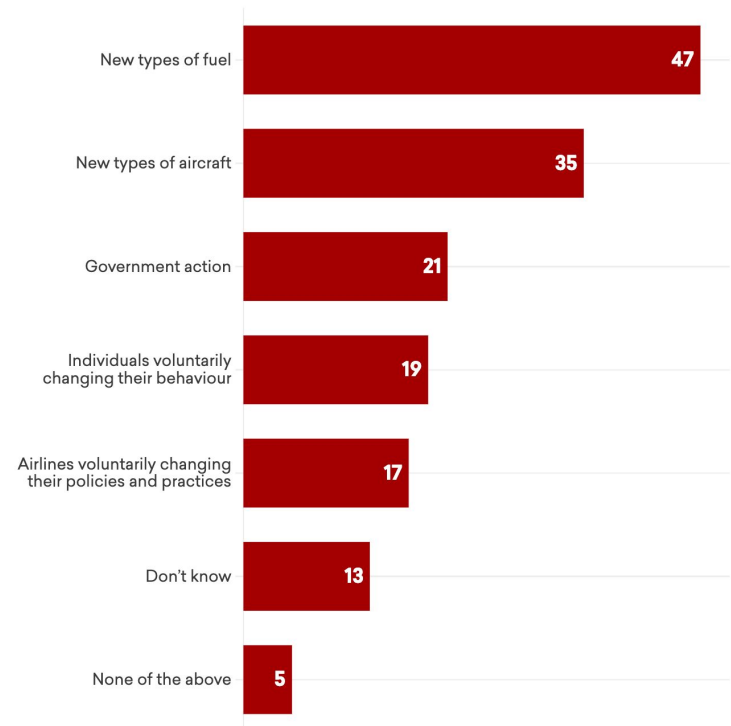
Asked what they expect to play the biggest role in decarbonising aviation over the next ten years, technological advances in new types of fuel and aircraft top the list in every country.

While there is more optimism about technological advances than other actors driving change in the aviation sector, the public are not overly optimistic about the role that technology can play in promoting change.

Rather, the high ranking of technological solutions - in response to the question of what is most likely to help decarbonise aviation in Europe - is likely more indicative of the extremely low trust that Europeans have in their politicians and aviation businesses when it comes to meaningfully implementing change.

People who say they “strongly trust” their national government are 50 per cent more likely to say that government action will reduce the impact of flying over the next ten years than those who say they “strongly distrust” the national government - but even these high-trust individuals are more likely to say that new technologies will drive the change than anything else.

Which of the following do you think will play the biggest role in reducing the climate impact of flying over the next ten years? Select two.



Flyers and airlines should pay

The public think that the cost of a green transition in aviation should come from the money spent on aviation, rather than from public spending.

Across the six countries, 53 per cent of people say that decarbonising aviation should be paid for either by taxing jet fuel or raising ticket prices for passengers. Cutting government spending, increasing borrowing, or raising taxes elsewhere were selected by significantly smaller minorities in each country.

Non-flyers are unsurprisingly more willing to say that flyers should front the cost for decarbonising aviation, but flyers mostly share their views. In focus groups with non-flyers and flyers alike, it was clear that any suggestion that the government would pay to decarbonise flying was dismissed, given the perceived profits that airlines are making.

If the government decided to raise money to fund efforts to reduce the environmental impact of flying, how should it do this? Select up to two.



Public want some flyers to pay more than others

While the public want flyers to pay for the cost of decarbonising aviation, they do not necessarily want blanket policies that would mean the bill would be shared among all flyers equally.

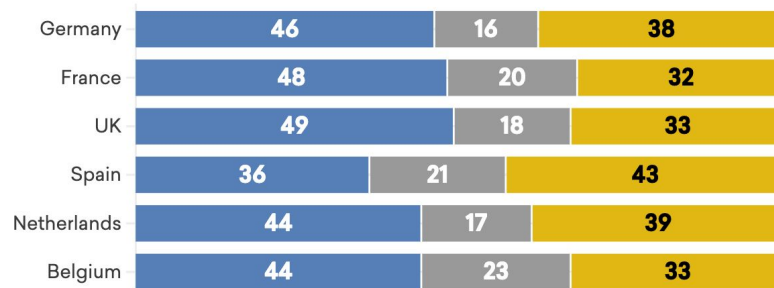
In all of the countries, apart from Spain, the public would rather the government target people who fly the most rather than focusing on all flyers equally.

Notably, support for targeting frequent flyers is higher among those who have flown at least once in the last three years (47 per cent versus 42 per cent) - perhaps because many of them fly occasionally but do not consider themselves “frequent” flyers so are worried that a blanket approach would harm them. Focusing on the most frequent flyers could help avert some of the perceived threat of blanket policies that concern many occasional flyers.

Ideological differences within countries also impact whether the public want the government to target frequent flyers. For example, in the UK, six out of seven of More in Common’s British Seven segments want targeted interventions, but Backbone Conservatives favour the blanket approach.

If the government wanted to limit the total overall number of flights being taken, in order to reduce the environmental impact from flying, which of the following comes closest to your view?

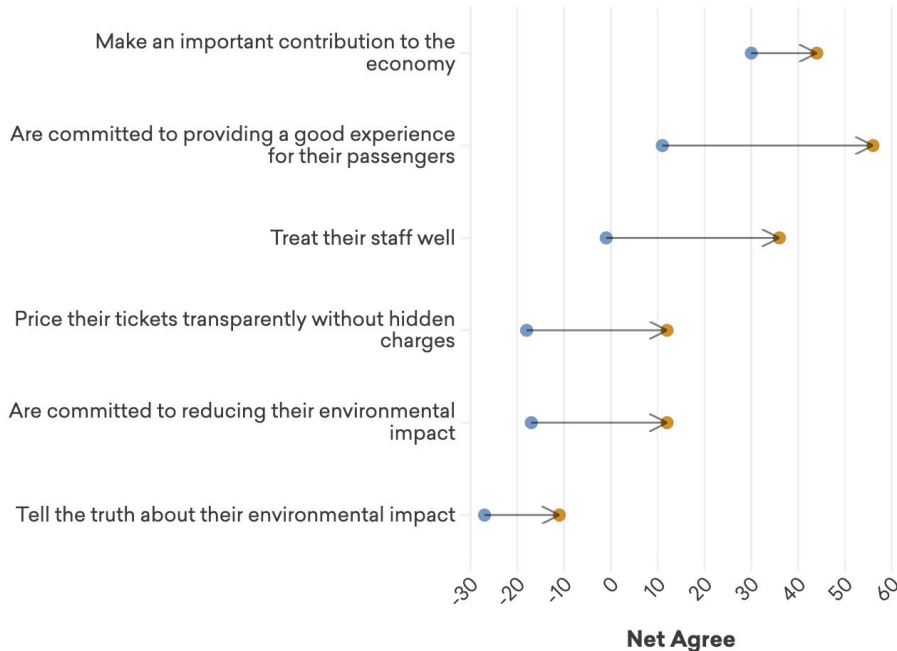
- Government efforts should focus on those who fly the most
- Don't know
- Government efforts should focus on all flyers equally



Public are sceptical of airlines

Thinking about [.....] Do you think they...

● Budget airlines ● Legacy airlines



While the public have a generally positive view of flying, and think that airlines are important (if not essential) to the economy, they see airlines as businesses driven by the bottom line with incentives to downplay their environmental impact.

Across the six countries, the public do not trust airlines to tell the truth about their environmental impact. This scepticism is significantly higher for budget airlines than it is for legacy carriers.

While the public in all six countries distrust both budget and legacy airlines to tell the truth about their environmental impact, Germans are notably more sceptical than those in other European countries - 45 per cent of Germans think that legacy airlines don't tell the truth on their environmental impact, compared to 34 per cent across the other countries.

This scepticism means that people are already likely to see through much of the green communications from airlines. This suggests that additional 'greenwashing' strategies may do little to further sway public opinion on trust for airlines and may simply reinforce existing scepticism of airlines. Instead, efforts which focus on environmental transparency of airlines are likely to land better.

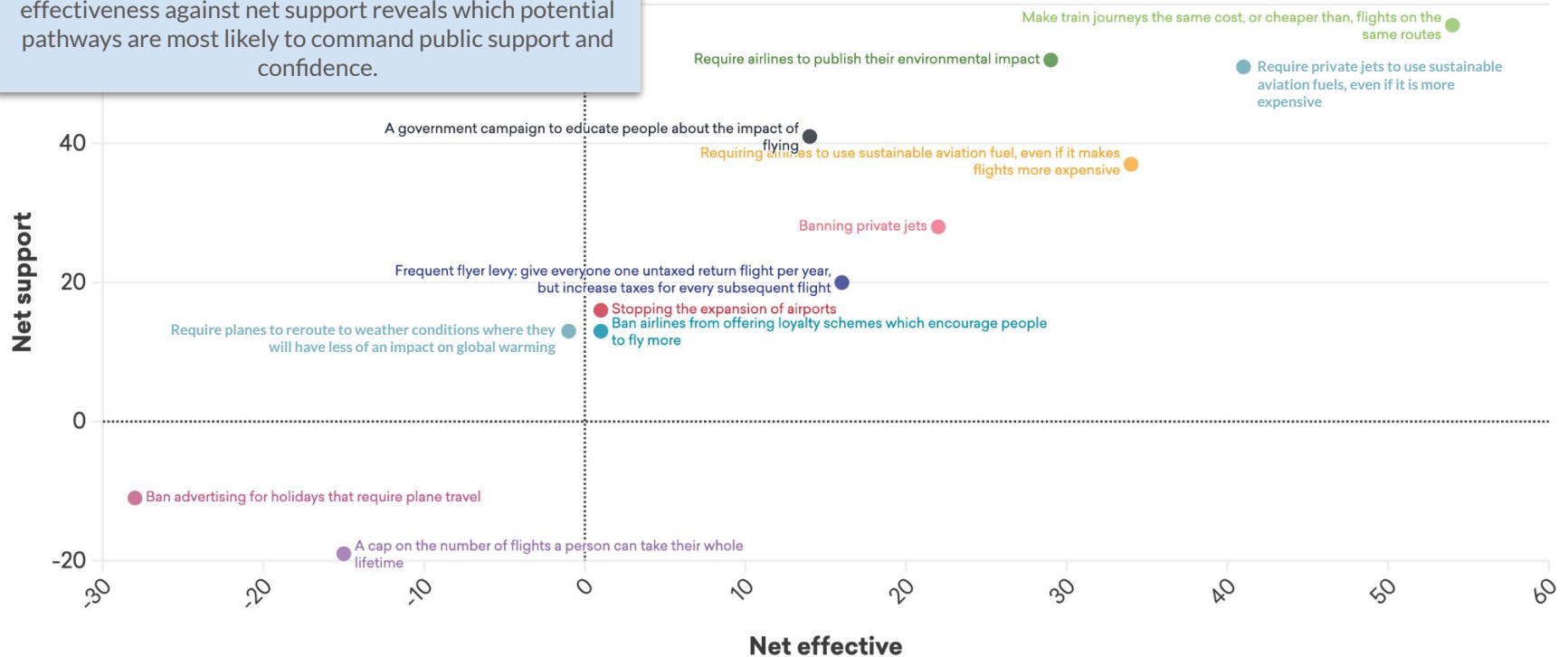
Part 3

How would the public reduce aviation emissions

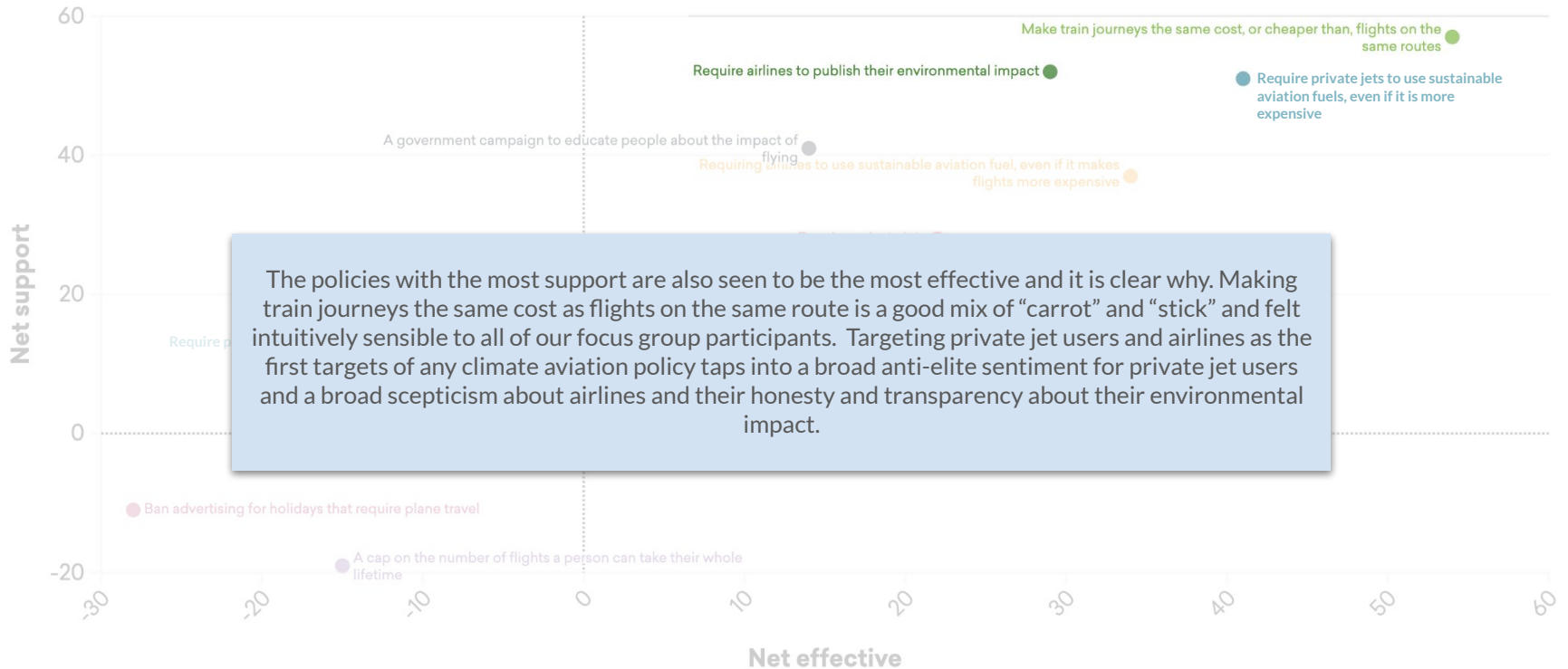
Overall policy picture

Which policies attract the most support?

Plotting a range of policy options by perceived effectiveness against net support reveals which potential pathways are most likely to command public support and confidence.

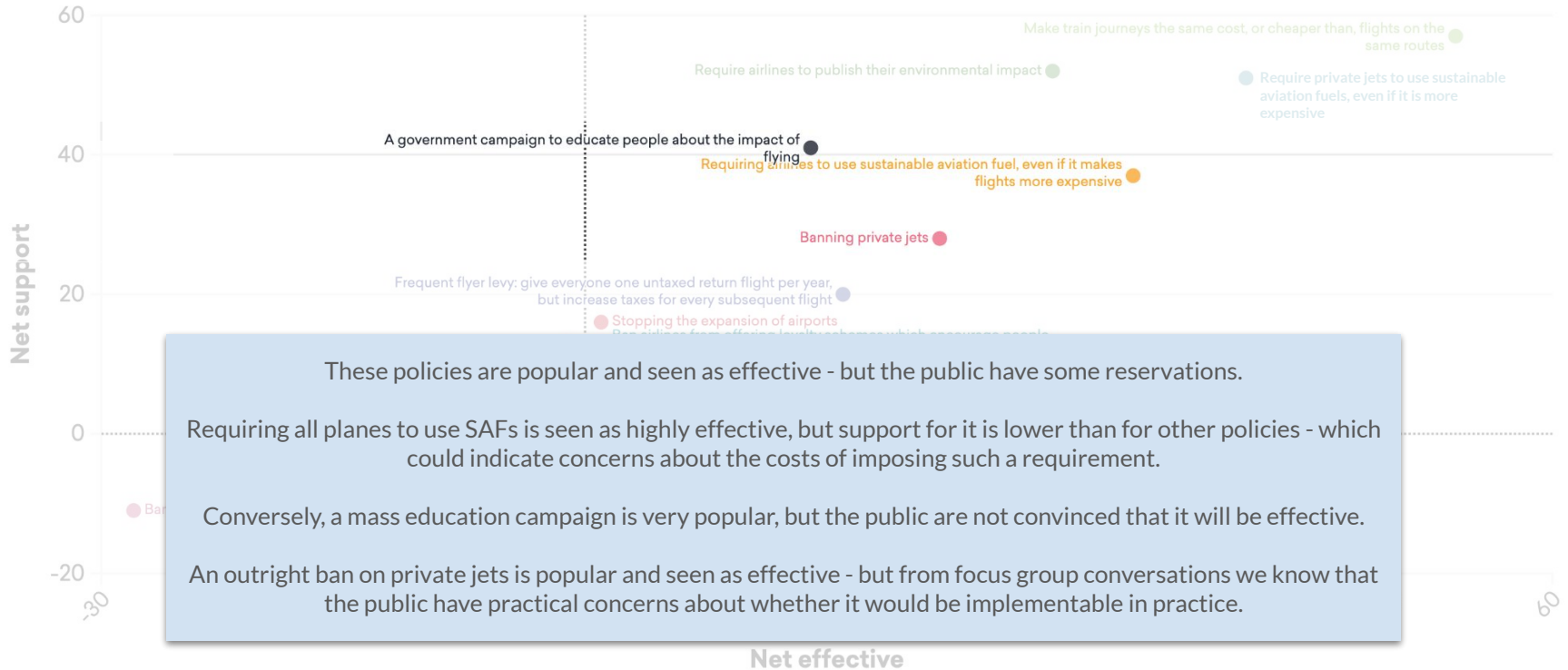


Which policies attract the most support?



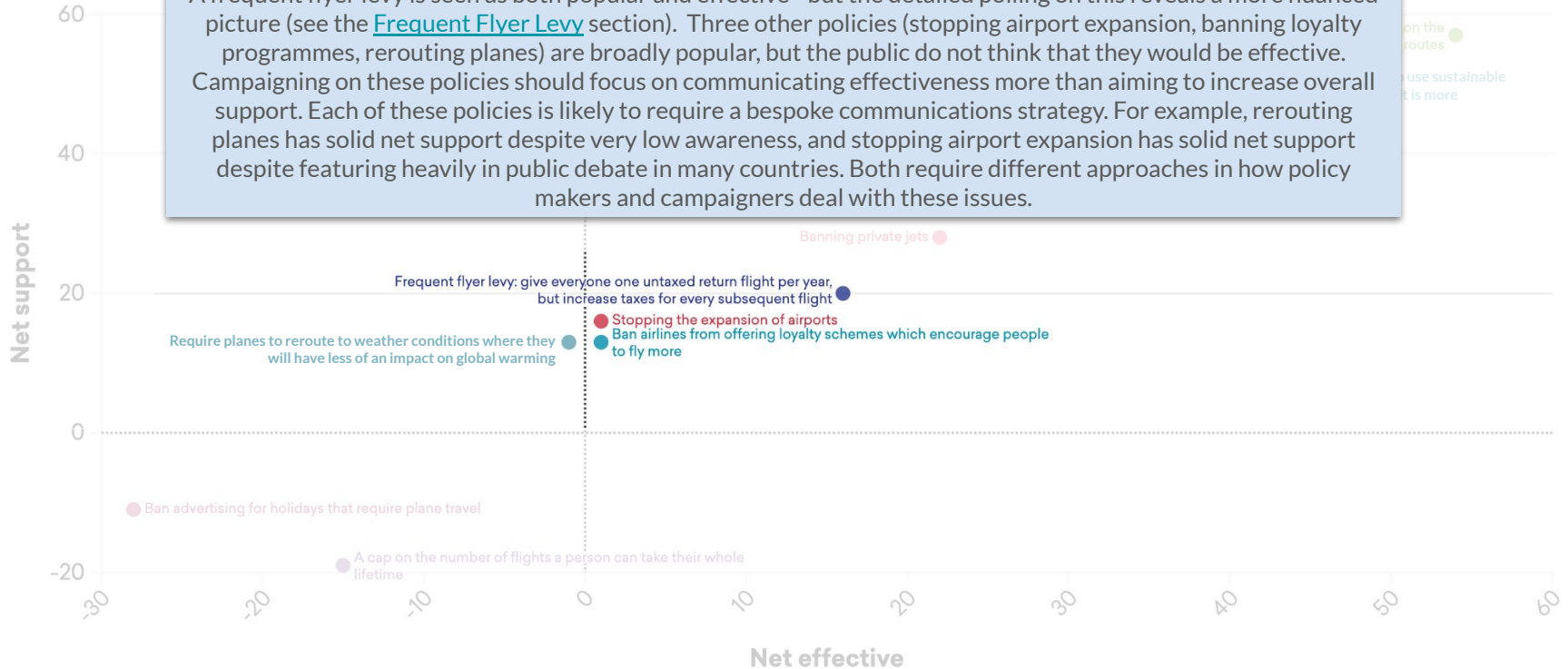
The policies with the most support are also seen to be the most effective and it is clear why. Making train journeys the same cost as flights on the same route is a good mix of “carrot” and “stick” and felt intuitively sensible to all of our focus group participants. Targeting private jet users and airlines as the first targets of any climate aviation policy taps into a broad anti-elite sentiment for private jet users and a broad scepticism about airlines and their honesty and transparency about their environmental impact.

Which policies attract the most support?



Which policies attract the most support?

A frequent flyer levy is seen as both popular and effective - but the detailed polling on this reveals a more nuanced picture (see the [Frequent Flyer Levy](#) section). Three other policies (stopping airport expansion, banning loyalty programmes, rerouting planes) are broadly popular, but the public do not think that they would be effective. Campaigning on these policies should focus on communicating effectiveness more than aiming to increase overall support. Each of these policies is likely to require a bespoke communications strategy. For example, rerouting planes has solid net support despite very low awareness, and stopping airport expansion has solid net support despite featuring heavily in public debate in many countries. Both require different approaches in how policy makers and campaigners deal with these issues.



Which policies attract the most support?



Part 3

**How would the public
reduce aviation emissions**

Policy deep-dives

1. Private jets - a clear first target

Private jets are nowhere near the largest contributors to climate change from aviation, but qualitative and quantitative research shows that - by some margin - private jets are the public's preferred target for measures to reduce aviation demand and a logical starting point for both campaigners and policymakers working on reducing aviation emissions.

For other forms of flying, such as commercial short-haul flights between European countries, people tend to think that it should be affordable (as a luxury treat if not a necessity) for most people. But the public are comfortable about private jets only being affordable to the most wealthy, and two in five (40 per cent) think that it is fine if nobody can afford flights on private jets. This makes the public particularly comfortable with targeting private jet users.

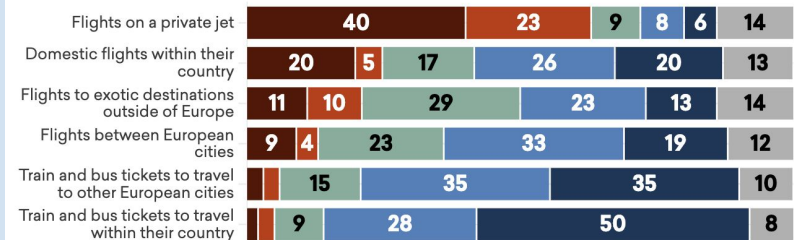
Targeting private jets also provides an opportunity to tap into anti-elite sentiment. The broader climate backlash in Europe has, in part, been brought about by concerns that leaders are out-of-touch for introducing policies that many citizens cannot afford including adopting expensive new technologies. In this context, a well-communicated policy of taxing private jets to pay for environmental benefits for everyone else could help send a strong signal that leaders want to target those with the broadest shoulders, rather than those families currently struggling, as they aim to reduce the emissions impacts of the aviation industry.

If the cost of shifting aviation to green technologies was passed onto passengers through their ticket prices, who should pay for this? Select all that apply.



For each of the following, please tell us who you think should be able to afford them?

- Nobody needs to be able to afford this
- It's fine if only the wealthiest can afford it
- It's fine if only people on an average salary or above can afford this
- Even people on minimum wage should be able to afford this
- Even people on out-of-work benefits should be able to afford this
- Don't know



Opportunities for landing private jet policies

Policy development and campaigning action on private jets also offers an opportunity to tap into national stories about private jets or famous users to land messages, campaigns or policy narratives more effectively. Having a clear and popular 'loser' for a proposal can be a helpful device to enable the plans to survive contact with political reality and broader public opinion.

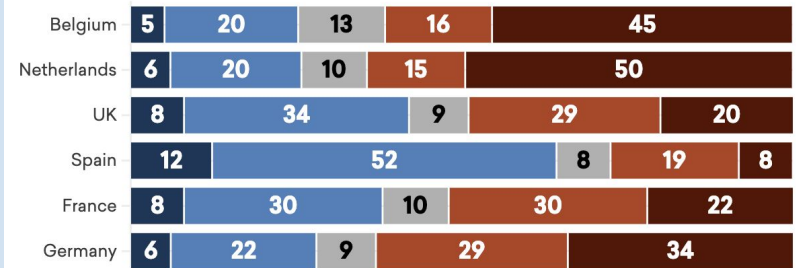
In focus groups across countries, 'private jet stories' were raised unprompted by participants. In the UK, the Prime Minister's regular use of private jets and helicopters regularly comes up in focus groups without prompting. Similar stories emerged in Spanish focus groups about the Prime Minister's *Falcon* jet, and the Belgians' criticism of EU diplomats jetting in and out of Brussels. In France, online tracking of Bernard Arnault's private jets also came up unprompted. In the UK, participants questioned footballers' use of private jets when coaches were a good alternative, though this story worked less well in Spain.

Across these examples, there is an opportunity to tell a story about leaders not leading by example, tapping into anti-elite sentiment by promoting policies that force those with the broadest shoulder to take their climate impact seriously and spread the cost burden proportionately. A private jet tax also allows campaigners and policymakers some room on the question of how we 'pay' for the net zero transition.

When it comes to messaging on private jets, it is tempting to only drawn on messages around "fairness" - e.g. "it is unfair that the wealthy can fly in private jets and we can't" - but there is also an opportunity to appeal to moral foundations held more strongly by right-leaning groups, such as on leadership, purity, and authority.

When footballers travel between matches within [country], do you think it is...

- Always appropriate for them to travel by plane
- Sometimes appropriate for them to travel by plane
- Don't know
- Rarely appropriate for them to travel by plane
- Never appropriate for them to travel by plane



"I just don't understand why politicians have to travel by private plane to go to a dinner. It's total classism." (Spain)

"The [EU Bureaucrats] fly in and out of Brussels on their private jets, and expect us to limit our own flying." (Belgium)

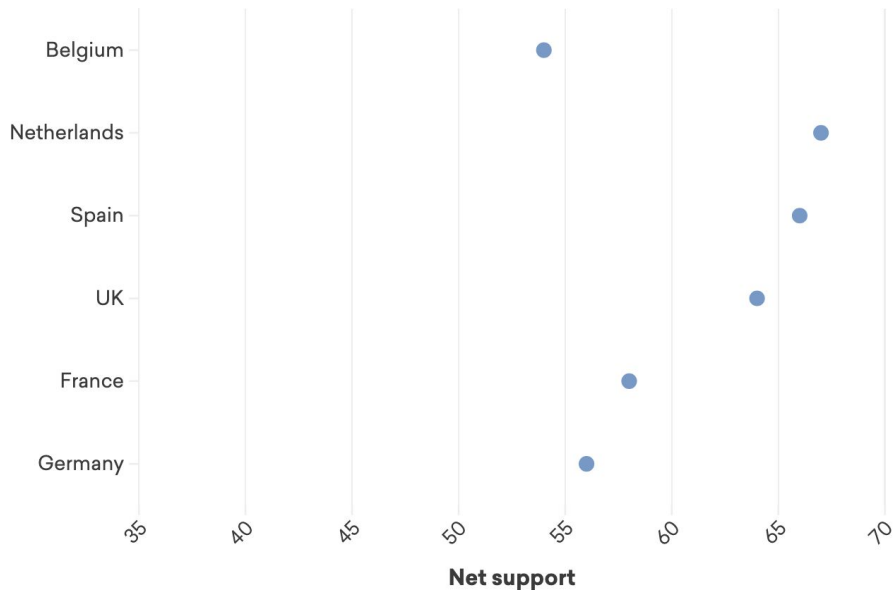
"There is no way that a footballer needs to fly from Manchester for his match in Liverpool - it's completely ridiculous." (UK)

2. Making trains cheaper: an “obvious” priority

Currently, many flights around Europe are much cheaper than train journeys on the same route.

To what extent would you support government action to ensure that train journeys are always the same cost, or cheaper, than flights on the same route?

The government could put additional charges on flying, and use the money raised to make train travel cheaper. To what extent would you support this?



“It’s OBVIOUS that the answer is to encourage train travel.”
(France)

Across all countries there is dissatisfaction with the cost of train travel, and a sense that charging more to take a train than to take a flight is illogical. Some had heard news stories of people from the same country flying to meet friends abroad, or taking long-winded journeys by plane, because it was cheaper than taking a train journey within their own country.

In all six geographies, and for both flyers and non-flyers, there was strong support for the government ensuring that train journeys are either cheaper than or the same cost as flights.

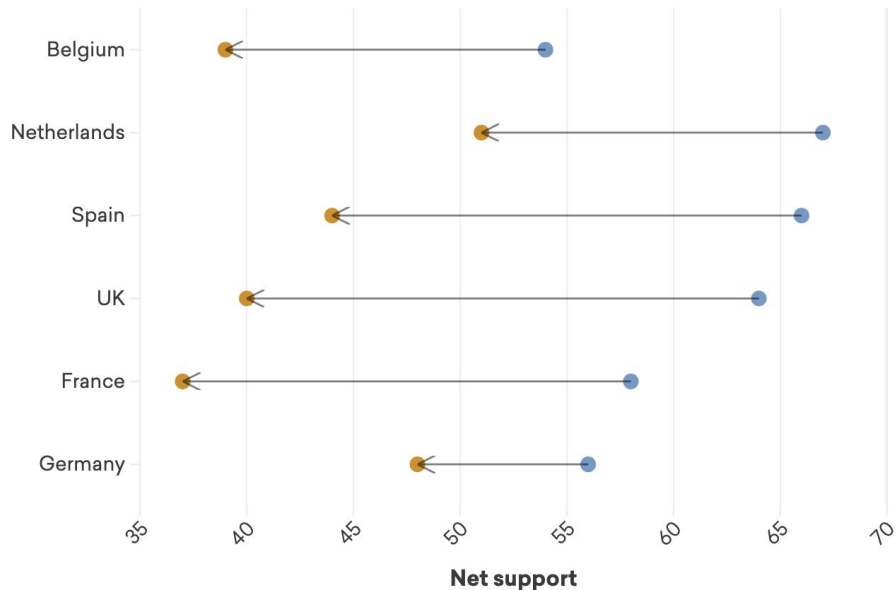
Most participants prefer travelling by train, but see it as costly or impractical. They think pro-train policies would discourage flying while benefiting citizens.

“I think it would be great if the trains worked in such a way that they represented an alternative, that would actually be the optimal thing, but I think that doesn’t work, which is why I find it problematic.” (Germany)

... even if that means making flying more expensive

Currently, many flights around Europe are much cheaper than train journeys on the same route.

- To what extent would you support government action to ensure that train journeys are always the same cost, or cheaper, than flights on the same route?
- The government could put additional charges on flying, and use the money raised to make train travel cheaper. To what extent would you support this?



Support for making train travel the same cost as flying remains high (albeit lower) when the proposal to do so is paid for by increasing the cost of plane fares. Support is higher among non-flyers, but even those who fly frequently are happy with increasing the cost of plane tickets if it means bringing train prices down.

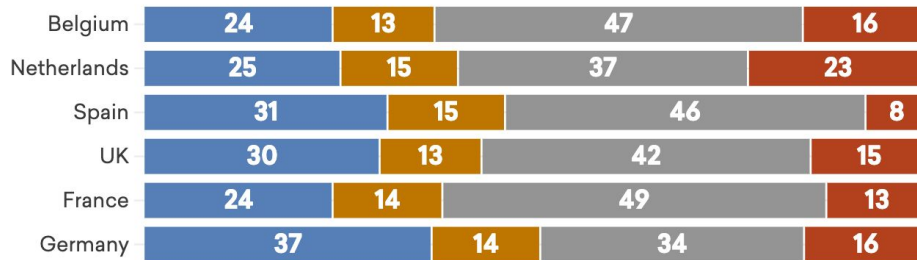
This makes sense when comparing which forms of transport are seen as necessities, and which are seen of as luxuries.

People see domestic and international short-haul flights a luxury, but are much more likely to see domestic and international short-haul train and bus travel as a necessity.

Trains vs planes - awareness challenges

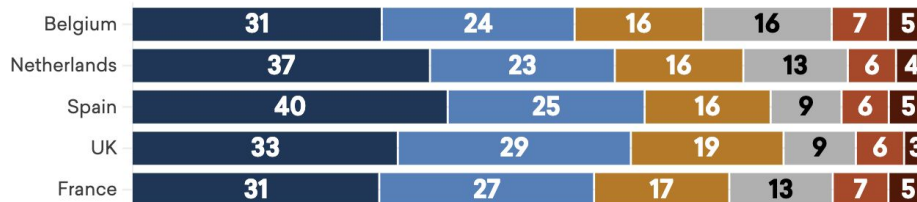
At the moment, do you think that trains are subject to...

- A lower rate of tax than flying
- The same rate of tax as flying
- Don't know
- A higher rate of tax than flying



How convincing or unconvincing do you find the following arguments: [It's unfair that we have to pay tax on the fuel we use in cars and trains, but airlines don't have to pay tax on the fuel they use in their planes]

- Very convincing
- Somewhat convincing
- Neither convincing or unconvincing
- Don't know
- Somewhat unconvincing
- Very unconvincing



One potential mechanism through which the government could start to equalise the cost of plane and train travel is through taxing jet fuel which is currently untaxed.

In focus groups, it made intuitive sense to people that jet fuel should be taxed at the same or a similar rate to the fuel they buy at the petrol station, but there was low awareness of the effectively untaxed nature of jet fuel.

When made aware of this discrepancy, there is a sense that something should be done about it, and polling shows that this inequality message works - but a key challenge for policymakers and campaigners is raising awareness of the issue.

Across every country asked, fewer than a quarter of respondents were aware that that trains are subject to a higher rate of tax than flying.

"I cannot believe that there is no tax on [jet] fuel. This is completely unfair and it should change." (Netherlands)

3. Embracing new technologies to drive progress

The public are generally confident about the role that new policies could play in decarbonising aviation - but not all technologies are seen as equal.

Across the countries, improvements in aircraft efficiency are seen as the most likely drivers of aviation decarbonisation.

In five of the countries, people are more confident about SAFs than they are biofuels - the exception is France where there is notably more confidence that biofuels will help decarbonise aviation, perhaps reflecting the efforts of French biofuel advocates.

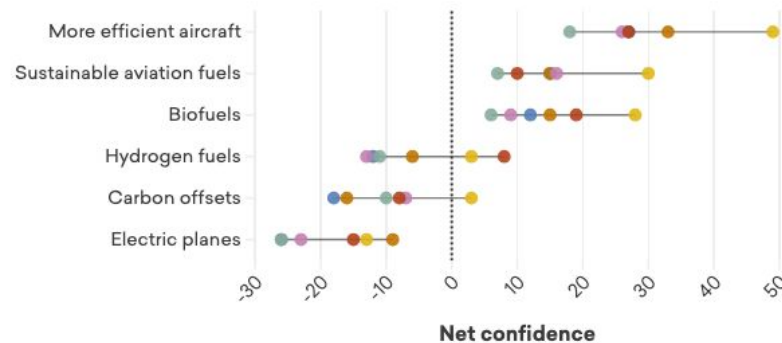
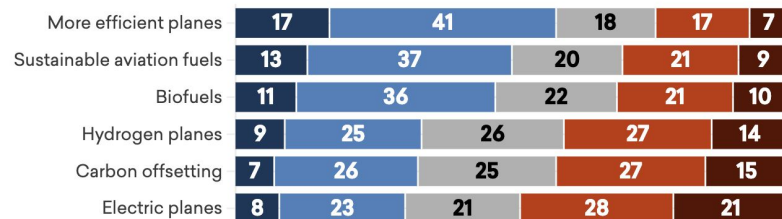
Confidence in zero emission hydrogen and electric aircraft is lower than for simple fuel switching and efficiency improvements. This is more likely to reflect limited awareness of these technologies, rather than a deep understanding of their technical limitations. It might also be symptomatic of aviation industry communications which prioritise efficiency improvements and sustainable aviation fuels over zero emissions aircrafts.

The lack of confidence in carbon offsetting is also noteworthy and might reflect campaigners' efforts to highlight the limitations of offsetting.

In general, people in Spain are much more confident that all of the technologies tested will help decarbonise flying, and people in Germany are the most sceptical.

How much confidence do you have in the following options to reduce the emissions coming from flying in the longer term, by 2050?

● A great deal of confidence ● Some confidence ● Don't know ● Not much confidence ● No confidence at all



Country: ● Belgium ● Netherlands ● Spain ● UK ● France ● Germany

4. Openness to sustainable aviation fuels, but low awareness and some scepticism

While awareness of sustainable aviation fuels is very low, polling evidence suggests that, in the abstract, Europeans would prefer to fly with an airline that uses sustainable aviation fuels (SAFs). This is in spite of the fact that most would not trust an airline that claimed their fuels were sustainable. This suggests that the word “sustainable” in sustainable aviation fuels goes a long way in increasing favorability of SAFs, but there is plenty of opportunity for campaigners to draw on public distrust of airlines’ environmental messaging to push for more effective green fuels than a general push towards SAFs.

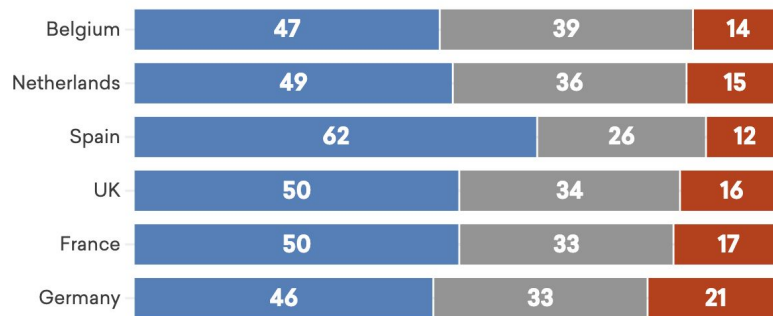
As with other technologies, the Spanish are most optimistic about SAFs and Germans are least optimistic - but the headline picture is fairly similar across countries.

Awareness of SAFs is likely to increase as airlines ramp up their SAF offering and advertising over the coming years. The public’s default position is positive towards anything labeled “sustainable”, but sceptical towards marketing from airlines - campaigners who want the aviation policy debate to move beyond SAFs ought to work with the latter to lessen the impact of the former.

“They can tell us that the fuel is green, but how do we know that it is true? Only in the case of independent research do we know that is true.” (Netherlands)

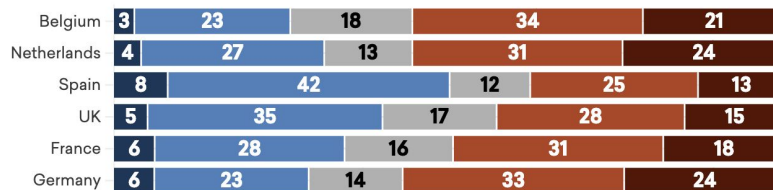
Which of the following comes closest to your view?

- I would prefer to fly with an airline that uses sustainable aviation fuels
- Don't know
- I would not prefer to fly with an airline that uses sustainable aviation fuels



How likely are you to believe an airline if they described their fuel as “sustainable”?

- Very likely
- Somewhat likely
- Don't know
- Somewhat unlikely
- Very unlikely



Some arguments about SAFS resonate more than others

When it comes to campaigning on SAFs, the public are more open to some arguments and more critical of others.

In general, people think that fuel produced from household waste or from carbon capture seems like a good idea, but are much more sceptical of the idea of using crops to produce biofuel, or airlines paying other airlines for credits rather than using SAFs in the plane itself.

This scepticism is likely to be driven by different factors. The biofuels scepticism may reflect the campaigning by some civil society organisations on the unsustainability of biofuels. The scepticism about airline credits is likely to reflect a broader scepticism that the public has about paying others to do the job for you rather than doing the job yourself (as is shown with broad public scepticism on carbon offsetting).

If an airline created each of the following types of new fuel, do you think it would be a good idea or bad idea for airlines to use them?

● Sounds like a very good idea ● Sounds like a somewhat good idea ● Don't know
● Sounds like a somewhat bad idea ● Sounds like a very bad idea

The fuel is produced from household waste, which we should be reducing anyway



The fuel is produced by capturing carbon emissions from industrial factories, which they could eliminate completely by using clean technologies



The fuel is made from crops instead of fossil fuels, but the crops require vast amounts of land to grow, which could otherwise be used to grow food or protect wildlife



The airline uses normal jet fuel, but pays another airline to use sustainable fuels as a credit to make their flights seem more sustainable



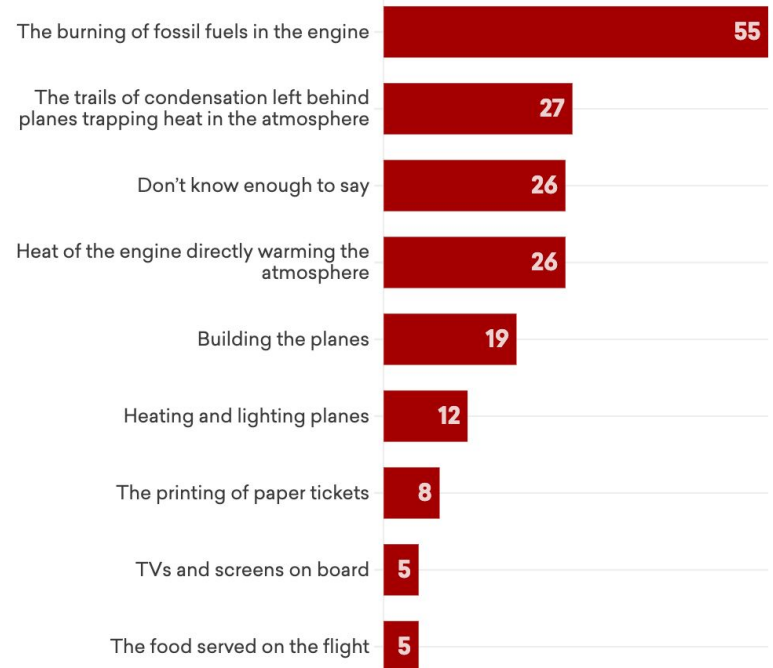
5. Dealing with contrails and non-CO₂ impacts of flying

Recent years have seen growing evidence about the non-CO₂ impacts of flying, particularly caused by “contrails” - the clouds of vapour left behind planes. Recent studies suggest that contrails could be responsible for more than half of the total warming impact of flying (Fredenburgh 2022), but their impact are not yet built into any policy frameworks to deal with the impact of flying such as CORSIA, beyond the EU agreement to measure non-CO₂ effects through the Emissions Trading System later this decade.

In European public opinion, there is low awareness of the impact of contrails. Asked to choose what are the biggest causes of warming from planes, most identify the use of fossil fuels. But in every country apart from the UK and Germany, people are more likely to think that the heat of a jet engine is a big cause of global warming than they are to blame contrails - when in reality, this has almost zero impact on global warming.

While there is increased policy debate about contrails in the EU and UK, it is worth campaigners remembering that this is not a debate which is significant in the public discourse on flying - and there is a strategic debate for policymakers and campaigners to have about whether it should be.

Which of the following do you think will play the biggest role in reducing the climate impact of flying over the next ten years? Select two.

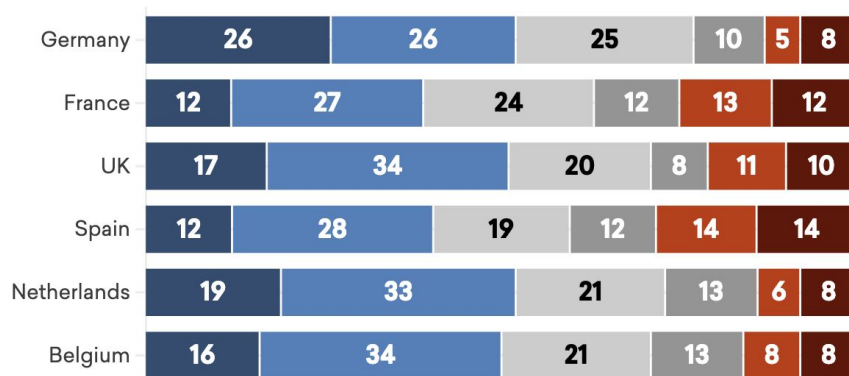


6. Frequent flyer levy - popular in theory

Some people have proposed a “frequent flyer levy”, whereby everyone is entitled to one tax-free flight per year, but subject to an increasing tax on every subsequent flight. The aim is to discourage frequent flying, and make those who fly more pay more for the environmental impact of their flights.

In general, do you think this is a:

● Very fair policy ● Somewhat fair policy ● Neither fair nor unfair policy
● Don't know ● Somewhat unfair policy ● Very unfair policy



In the abstract, the public tend to think that a frequent flyer levy is both fair and effective - something that holds across all countries and almost all demographic groups.

This makes sense given that the public want a targeted approach to tackling the climate impact of flying, and are much more likely in polling to prefer coercive measures via taxes than absolute measures via bans, caps and limits.

But in focus groups, participants expressed real practical concerns about the feasibility and fairness of potential frequent flyer levies. These include:

- A sense that it would be impossible to implement in practice
- The fact that one long flight could cause more damage than frequent short flights
- Suspicions that the government is just introducing this to raise more money
- Worries that this will impact holidays or essential trips

Frequent flyer levy scepticism in qualitative research

“When I read the first two [policies] I can get aggressive. Limiting the number of flights. Now they want to prescribe or prohibit you, this prescriptiveness, they want to dictate things to us or prohibit them, even the first word prohibition. [...] We aren't children, sorry.” (Germany)

“What is the government doing with it? I don't want flying to become more expensive just so the state has more money. I want a return for all of us, not just for the environment, and the fact that our finance minister can book a few zeros for himself is nonsense.” (Germany)

“I make a lot of efforts elsewhere, I don't want to be made to feel guilty about the 2 or 3 times I take the plane each year.” (France)

“France is supposed to be the country of freedom, I feel like we are no longer in France.” (France)

“I feel like I'm being punished, and it's like throwing money in the air.” (France)

“It wouldn't necessarily work either would it? Because you could have one flight a year but you fly to Australia and back. Whereas someone else could fly once a month to Paris and back and they're actually doing less miles and less harm to the environment but they'll get taxed to the hilt.” (UK)

“Thinking about somebody who works abroad, what if they then chose to go on holiday with their family? They would then end up paying tax on their holiday flight. So I think it can penalise a lot of people.” (UK)

Low awareness of the frequent flyer levy

Both a challenge and opportunity for those looking to implement a frequent flyer levy is that public awareness of the policy is relatively low.

Germans are most aware of the term (40 per cent of Germans have heard of the term) and Belgians are least aware (only 28 per cent of Belgians have heard of the term). This is a challenge for its advocates because they are facing an uphill battle when it comes to first explaining the policy to voters and then persuading them of the merits - as the old adage goes, 'when you're explaining, you're losing'.

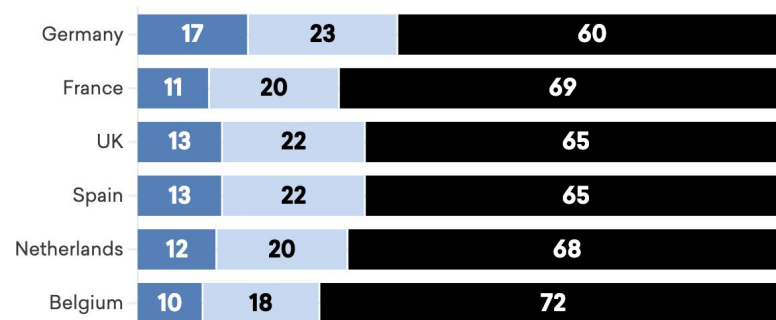
When first mentioned in focus groups, participants in many cases were more likely to think about airlines' frequent flyer programmes that encourage more flying than any policy initiative to discourage it. Further work is needed to test whether efforts should be focused on adopting a new language that distinguishes frequent flyer levies from frequent flyer loyalty programmes, or whether work should focus on shifting public attitudes on frequent flyers.

Furthermore, the low awareness also means that most people don't know the detail of the policy - such as that everyone is entitled to one tax-free flight per year - which makes it easier for them to be dismissive of the policy.

However, there might also be an opportunity for its advocates. The low public awareness means that there is little baggage associated with a "frequent flyer levy". If they can make a good first impression with their messaging, they might have much more success at building support for the policy in the long term.

Before today, had you heard of the term "frequent flyer levy"?

- Yes, and I'm confident I could explain what it means
- Yes, but I'm not sure I could explain what it means
- No, I have not heard this term before



Part 4

**Recommendations for
policymakers and
campaigners**

Bringing the public on board with policy changes

These recommendations should help policymakers craft (and campaigners advocate for) better designed policies that can more effectively bring the public on board with any aviation-related policy interventions, and more successfully navigate the challenge of reducing aviation emissions without risking public backlash:

Timing and sequencing is everything. The sequencing of the action on aviation climate emissions is likely to be as important as the policy framework itself. Given the current cost of living crisis, policymakers' short-to-medium term focus should be on action on private jets and plane to train schemes to build momentum, before any demand-side measures.

Think beyond flying. Getting this policy transition right matters beyond reducing aviation emissions. If done well, it can give policymakers a model for broader net zero policy change and the public a very tangible example of fair transition. If done badly, it's likely to push back some progress across policy areas of decarbonisation.

Airlines first. Policymakers should start with airlines and work from there. There are a series of clear quick wins (e.g. airline's environmental transparency) which should provide a helpful starting point for policy development that can command the public's confidence.

The simpler, the better. Policymakers should ensure that aviation policy has been properly tested against the public's practical questions (and scepticism) about how these measures will work in practice, who'll benefit, who'll lose out, and why. If these questions cannot be answered with simple answers, then the risk is that the policy falls at the first hurdle.

Protecting infrequent flying. Part of the policy challenge on reducing aviation emissions will be protecting infrequent flying behaviour - such as infrequent holidays abroad or visiting friends and relatives. While this is clearly a policy challenge, doing it successfully could help bring a large proportion of the public on board with a broader policy agenda.

A better alternative. A policy framework which reduces this debate to simply reducing aviation emissions is one that is unlikely to be resilient to public opinion and political pressures. A broader policy story is needed on climate and aviation whether that is investment in public transport or better in-country or cross-country train infrastructure.

Remember it's both emotional and practical. Another key part of the policymaker's challenge on climate and aviation is understanding that most people's connections with flying are both emotional and practical. Many people like flying - this should be front of mind for policy makers working on climate and aviation.

Landing the message with the public

In addition to designing and advocating for better policies, policymakers and campaigners should focus on communicating the policy changes more effectively:

Get the basics right. Awareness on many climate aviation policies is low and campaigners and policymakers need to reflect on where awareness needs to be higher for change to happen, and where it is not a priority for public awareness to increase.

Focus campaigning on building better alternatives. Few people will ever be animated by the environmental benefits of flying less, campaigners and policymakers should focus their advocacy on ensuring that the public have better options available to them instead of flying.

Identify nationally-relevant stories. Campaigners are more likely to be successful if they can tap into a relevant national story or narrative to land their ask or campaign. On private jets, there are many examples in each of the countries tested.

Focus on airline's environmental transparency. Most people don't believe airlines are being honest about their environmental impacts. Airline's environmental transparency should be a clear and immediate priority.

Tap into anti-elite sentiment. Reducing aviation emissions is an opportunity for the climate movement to show its on the side of ordinary people by targeting those with the broadest shoulder first. Anti-elite framing on private jets could be employed successfully.

Avoid hypocrisy. Climate hypocrisy really cuts through in focus groups (particularly the hypocrisy of private jets used at climate conferences). Campaigners need to focus on using messengers who are authentic and can't be branded as hypocrites.

Avoid shaming. Shaming people's flying behaviour is likely to increase the backlash against climate aviation action rather than help start behaviour change or increase support for policy change. It should be avoided by policymakers and campaigners.

Beyond greenwashing call-outs. Given the scepticism of airlines environmental transparency, few buy the green image many airlines project. Investing resources in calling out greenwashing is unlikely to shift public opinion on airlines, and at best should only reinforce it.



Part 5
**Deep-dive
country-by-country
analysis**

Deep-dive country analysis

Click on the boxes to learn more about specific dynamics in each of the six countries analysed

The UK

France

Germany

Spain

The Netherlands

Belgium

The UK

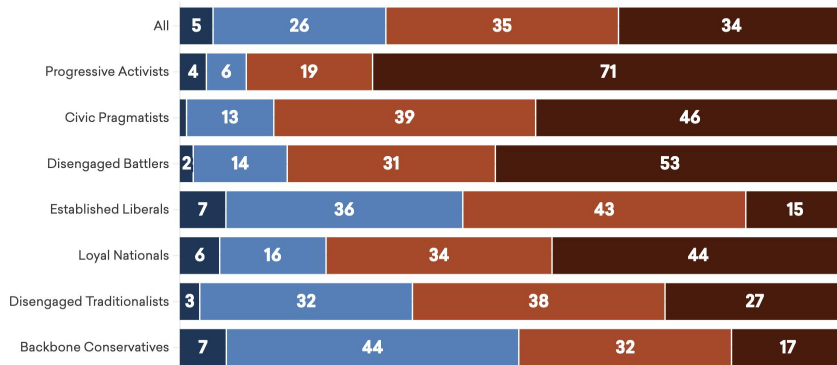
Navigating public opinion
on aviation and climate

The British context

Extremely low trust in government

To what extent do you trust the national government?

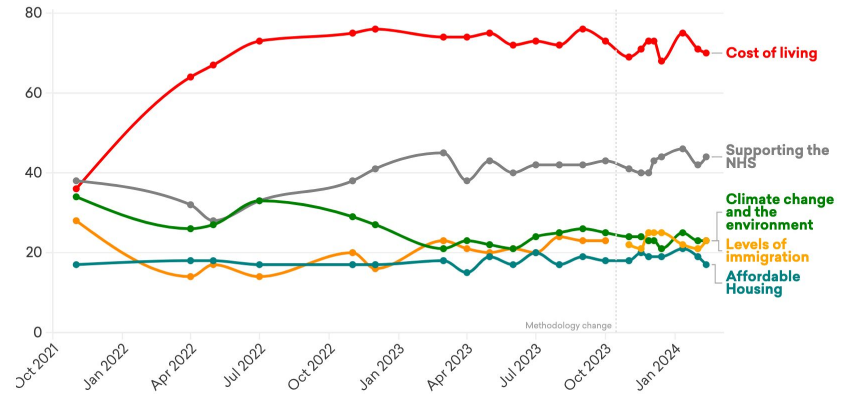
● Strongly trust ● Somewhat trust ● Somewhat distrust ● Strongly distrust



The overall public mood in Britain is defined by extremely low trust in government - even among segments who are loyal to the governing Conservative party. This shapes responses to all sorts of aviation policy. For example, focus group participants were clear that they did not trust the government to invest in making train journeys better, which made them more sceptical about bans on short haul flights.

Cost of living is THE concern

Britons' big issues over time



The cost of living will be the primary lens through which voters assess manifesto policies at the next General Election. Now is not the time for UK aviation campaigners to push for policies that make flying more expensive for everyone. Doing so would damage perceptions of this transition and limit future opportunities in the UK. Instead, policies need to be focused on frequent / private jet flyers, until the wider economic situation improves.

The British Seven Segments - a key lens to understand the politics of climate aviation

Progressive Activists



...a group for whom politics is an important part of their identity and who seek to correct longstanding injustices

Civic Pragmatists



...a group that cares about others, at home or abroad. They wish for less conflict and more compromise

Disengaged Battlers



... a group that are just getting by. They blame the system for its unfairness, but not other people

Established Liberals



...a group that has done well and means well towards others, but also sees a lot of good in the status quo

Loyal Nationals



...a patriotic group, who worry that our way of life is threatened and also feel our society has become more unfair

Disengaged Traditionalists



...a group that values a well-ordered society and prides in hard work. They want strong leadership that keeps people in line

Backbone Conservatives



... a group who are proud of their country, optimistic about Britain's future outside of Europe, and who keenly follow the news

How values shape attitudes to flying in the UK

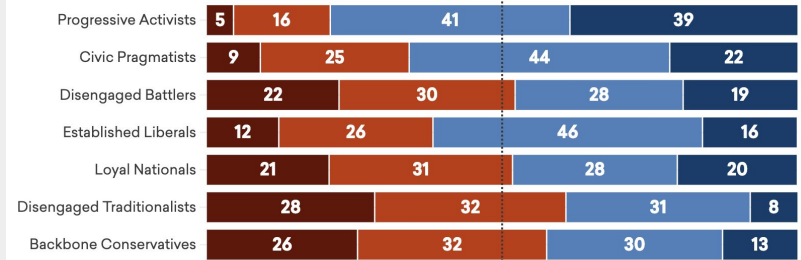
While the UK is not polarised along party lines, attitudes towards flying vary considerably by core values and worldviews. This can be explored using the [British Seven](#) segmentation.

A key value that shapes public opinion on a range of issues is threat perception. Those segments with a high sense of threat are more resistant to change than other groups who might be more optimistic about transition. In the UK, this divide is most clearly seen between the Loyal Nationals (LN), “typical Red Wall voters”, and Established Liberals (EL), “typical Blue Wall voters”, groups. ELs are very comfortable and have low threat perception - which makes them optimistic about the role that new technologies will play in the climate transition, and positive about the fact that aviation has increased so much in the last few decades. By contrast, LN’s threat perception makes them resistant to change and sceptical of the government’s intentions.

Progressive Activists are another key group to watch. They are highly engaged on climate issues and the only segment which enjoys talking about politics. They are supportive of significant interventions on climate change, but should be treated with caution as their attitudes often differ significantly from the public at large - including on how to reduce aviation emissions.

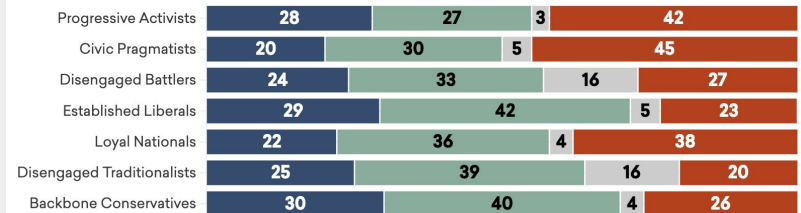
Unusual coalitions of different groups of the public can be brought together on different aviations. For example, despite having fairly different worldviews, the Progressive Activists, Civic Pragmatists and Loyal Nationals are more likely to think than more people flying around the world is broadly a bad thing.

- 1 - Economic growth should take priority over efforts to resolve climate change
- 2 -
- 3 -
- 4 - Efforts to resolve climate change should take priority over economic growth



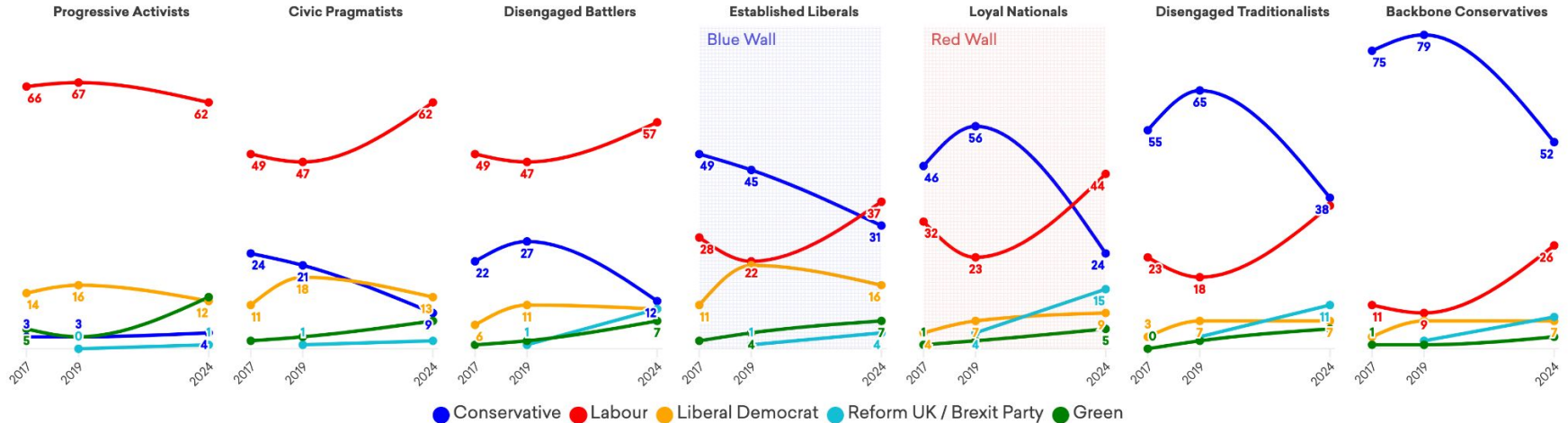
The rise of low-cost airlines and increasing incomes of people in wealthy countries has meant that people are now flying around the world more than ever before. Given this, which of the following comes closest to your view?

- People flying around the world now more than ever before is...
 - Broadly a good thing
 - Neither a good nor a bad thing
 - Don't know
 - Broadly a bad thing



Navigating the politics of aviation in the UK

How are the segments intending to vote?

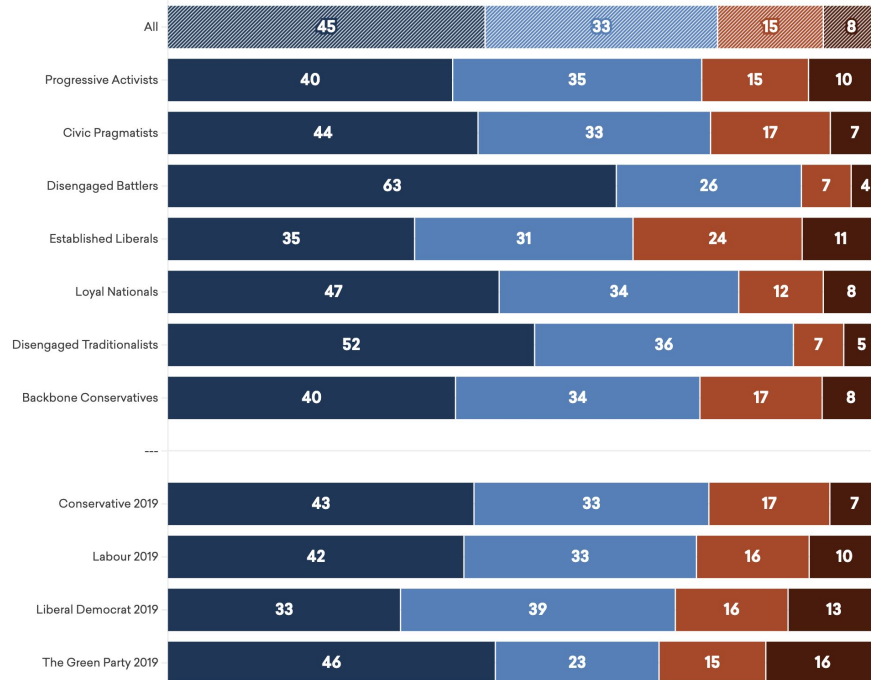


The British Seven segments provide a helpful lens for understanding the politics of the UK in the lead up to the next General Election. In 2019, Labour only won three out of the seven segments, with Boris Johnson's Conservatives taking the remaining four. Now, Labour has made gains across all segments and is solidly ahead with five of them. Progressive Activists, who were fans of Corbyn and are less supportive of Starmer's more moderate approach are the only segment to have swung away from Labour (mostly to green), whereas Backbone Conservatives are the only segment that solidly support the Tories. Reform UK has made big gains with Loyal Nationals and Disengaged Traditionalists - but are yet to prove whether they can translate this into election results.

How flying behaviour differs by segment

Number of return flights taken in the last year (modelled based off responses to a range of questions)

● 0 ● 1-2 ● 3-4 ● 5+



Understanding the segments' flying behaviour alongside their core values can help explain their starting points on aviation policy.

Disengaged Battlers, for example, are the least likely to have flown in the last year - with almost two thirds of them having not travelled overseas in the last year. This is explained more by their economic precarity than their worldviews - alongside Loyal Nationals they are the group most likely to say they wish they had travelled to more places.

There is a significant number of frequent flyers even among segments who might be expected to be more climate-conscious. For example, Progressive Activists are among the most likely to have flown more than five times in the last year - perhaps driven by their higher incomes and fewer family responsibilities.

Similarly, Green Party voters are the most likely not to have flown, but they are also the most likely group to have flown more than twice in the last year - again likely driven by higher incomes among other factors.

The British Seven segments' starting points on flying

Progressive Activists are the most concerned about climate change, but also among the most frequent flyers. They are unlikely to push back on policies relating to flying, but most likely to want to see efforts targeted at businesses rather than individuals.

Civic Pragmatists share many of the values of Progressive Activists, but fly less frequently and seem to enjoy flying less (they are much more likely to say that flying makes the “stressed” or “anxious”). They can also be useful messengers on aviation policy changes.

Disengaged Battlers are the most economically insecure segment and the least frequent flyers. Like other left-leaning segments, they want action taken on big polluters, but would also be happy if policies enabled them personally to fly a bit more frequently.

Established Liberals are the most financially comfortable segment, which makes them among the most frequent flyers. They are concerned about climate change, but much more optimistic about the role that market forces and technology will play in reducing aviation emissions, which makes them more resistant to government intervention and more optimistic about airline innovation.

Despite their social conservatism, **Loyal Nationals** are more closely aligned with Progressive Activists when it comes to aviation policy - mostly as a result of their more interventionist economic views. This makes them more supportive of action on private jets and frequent flyers than the general public. However, given their anti-elite worldview, they will not be supportive of frequent-flyers themselves pushing for change and will want to hear from less hypocritical voices.

Disengaged Traditionalists are the most individualistic of all of the segments. This makes them sceptical of strong government interventions. They are concerned about climate change, but less engaged in it. This makes them more likely to say they “don’t know” about a specific policy than to actively oppose it. They are the segment most likely to believe that restrictions on flying amount to curtailing individual liberty.

Backbone Conservatives care deeply about the environment but are more likely to look for a slower pace to decarbonisation and prefer an evolutionary approach rather than a complete overhaul of the status quo. They are proud of British Airways, and any cynicism they have is expressed towards budget carriers. They are more likely to see work travel as a necessity, but could be persuaded by arguments that more people should be taking holidays within the UK - drawing on their nostalgic and patriotic sensibilities.

Clear opportunity for action on private jets in the UK

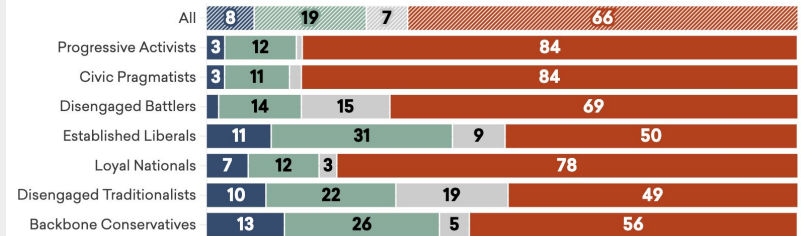
Anti-elite sentiment runs high in the UK at the moment, uniting both progressive and conservative segments. A majority across all segments disapprove of Sunak's use of private jets, and there is exceptionally high support for Labour's proposal to restrict ministerial private jet use. This unites Labour's emerging electoral coalition from Progressive Activists to Loyal Nationals, but does not alienate segments who are less likely to vote for them.

In fact, there is opportunity to go further with private jet policy in the UK. The UK public was among the countries most supportive of action on private jets. Restrictions on private jets will not shift the dial on the country's carbon emissions, but can help signal a broader approach to reduce emissions overall. It could help show that reaching net zero is not just about forcing normal people to change their lifestyles, but that those who pollute the most will have to lead the way, and those who have the broadest shoulders will bear their fair share of the costs.

Focus groups spontaneously mentioned the use of private jets by Premier League football players and politicians. Equally important will be finding positive messengers of leaders who have cut their jet use successfully.

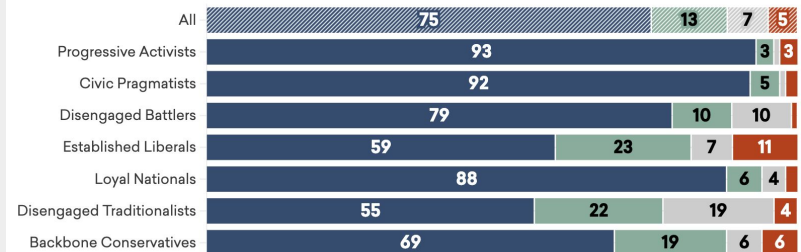
Rishi Sunak regularly travels around the country by private helicopter or jet, in order to save time. Do you think this is...

● A good use of taxpayer money ● Neither a good use nor a bad use of taxpayer money ● Don't know
● A bad use of taxpayer money



The Labour Party has announced that they will crack down on ministers travelling by private jet. Do you think this is a...

● Good idea ● Neither a good idea nor a bad idea ● Don't know ● Bad idea



Some, though weak, support for airport expansion

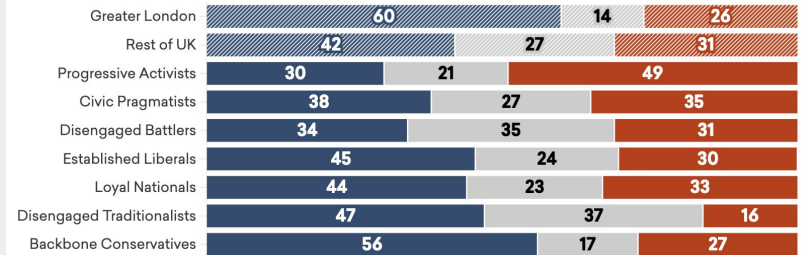
A number of high-profile applications have been submitted to expand airports around the UK (something that the Climate Change Committee has advised against), meaning that airport expansion will be one of the first decisions that the next government makes on aviation policy.

There is general support across the UK for airport expansion, across all segments apart from Progressive Activists. However, support is weak. For example, support for expanding Heathrow is much lower outside of London than it is in London. A plurality of Britons say that airport expansion is neither a good idea nor a bad idea, rather than expressing a view one way or another.

In qualitative research, people understood the arguments both for and against airport expansion. Participants in the North of England were most animated by the idea that significant investment in local airports could help level up their regions, and thought that more money to Heathrow and Gatwick were signs of excessive government spending in London. People were receptive to arguments about noise and carbon pollution, but issues such as increased road traffic were more tangible counter-arguments.

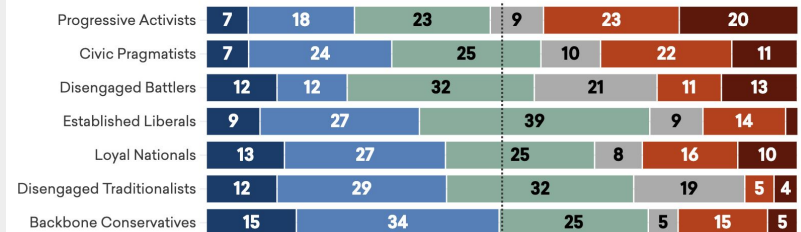
Which of the following comes closest to your view?

● Heathrow Airport should be allowed to expand
 ● Don't know
 ● Heathrow Airport should not be allowed to expand



A number of airports in the UK have submitted applications to significantly expand their operations - including a new runway at Gatwick almost doubling the capacity of Luton Airport.

In general, do you think these expansions are a...
 ● Very good idea
 ● Somewhat good idea
 ● Neither good nor bad idea
 ● Don't know
 ● Somewhat bad idea
 ● Very bad idea



Aviation at the next General Election

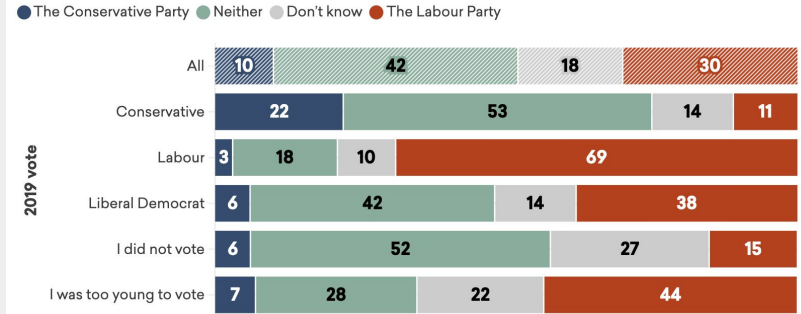
The public have little trust in any political party to deal with the environmental impacts of flying. Where an opinion is expressed, Labour have a considerable lead over the Conservatives on this question, and 2019 Conservative voters are more likely to say they trust neither party than the Conservative party.

Aviation policy is unlikely to play a major role in the next General Election. The Conservatives have already ruled out any major climate aviation policies and Labour have been cautious about any movement on climate aviation.

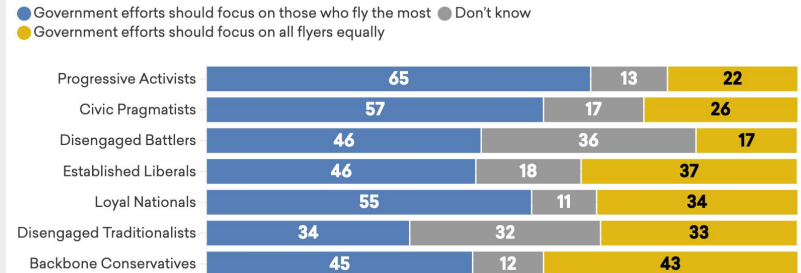
However, for whoever wins the next general election, avoiding climate aviation policy will be a missed opportunity to show what a fair transition could look like and demonstrate the trade-offs that the government and the public are willing to make.

One ideological difference that will present challenges to Labour is the extent to which different segments are comfortable targeting frequent flyers. More left-leaning segments support the idea, but parts of Labour's emerging voter coalition are less comfortable, and will need more persuasion on specific policies such as a frequent flyer levy.

Who do you trust the most to best deal with the environmental impact of flying?



If the government wanted to limit the total overall number of flights being taken, in order to reduce the environmental impact from flying, which of the following comes closest to your view?



France

Navigating public opinion on aviation and climate

Additional analysis from [Nuances d'Avenir](#)

The French context

The cost of living remains the #1 concern

With inflation at close to 5 per cent in 2023, the French public's main concern and the main focus of politics has been the cost of living crisis - organic food, popular in France, has been particularly impacted by inflationary pressures.

Most of the climate debate is focused on farming

Farmers' protest began in late 2023 and continue to fuel media and political debates in France. Most climate news revolves around the link between agriculture and environmental protection and will remain the focus for the foreseeable future.

EU elections has two themes: dominance of the far right and mistrust

In the past months, there has been a stable lead for the far right candidate to the EU elections Jordan Bardella who has around 30 per cent support in the polls, with Macron's party behind at 19 per cent. Around a quarter (25 per cent) of citizens do not express a voting intention. French people remain much more likely to think that EU membership is a good thing (51 per cent) compared to those who think it is a bad thing (20 per cent).

Aviation investments in France

In June 2023, President Macron announced a \$2.1 billion package to decarbonize the aerospace industry (2024 - 2030), focusing mainly on more efficient planes and SAFs development.



61 per cent of the French population do not trust the government

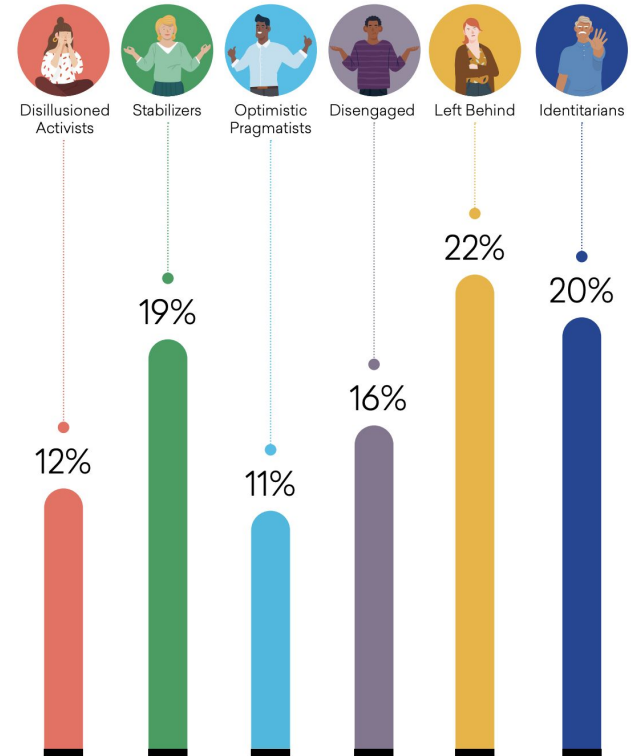


Six French Families - a unique way to understand French society and public opinion

The six French segments that emerged from Destin Commun's research have been used in this analysis to understand differences in flying attitudes and behaviours. A summary of the each of the groups is below:

- **Disillusioned Activists** (12 per cent of the national total): an educated, cosmopolitan and progressive group that is neither religious nor pessimistic.
- **Stabilizers** (19 per cent): a moderate, engaged and established group, which participates in civic life, is rational and compassionate, and holds a range of mixed opinions.
- **Optimistic Pragmatists** (11 per cent): a young, individualistic and pragmatic group which is both confident and entrepreneurial.
- **Disengaged** (16 per cent): a young, detached and individualistic group which lacks confidence.
- **Left Behind** (22 per cent): an angry and defiant group which often feels abandoned.
- **Identitarians** (20 per cent): an older, conservative and nativist group which is uncompromising and thinks France is a nation in decline.

More information on these segments is available on Destin Commun's [website](#).



Government and airlines lack credibility

French people tend to believe that industry innovation and behavioural change will play a bigger role than government action when it comes to reducing the environmental impact of flying. Half of the French public do not trust airlines claiming that their fuel is sustainable. However, while trust is low in airlines, trust in the government is even lower.

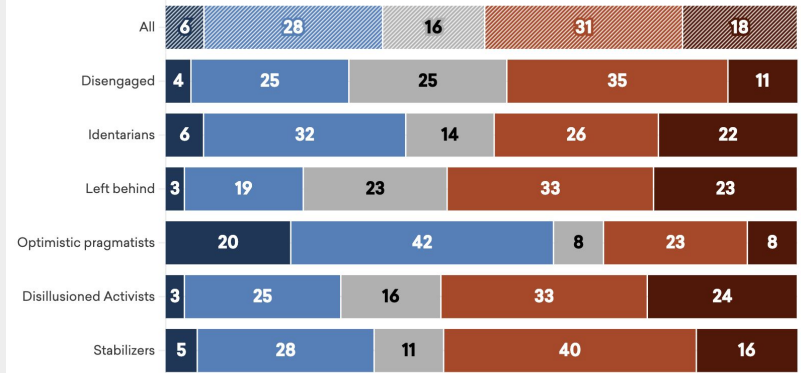
Air France enjoys a more positive image and greater credibility than low-cost carriers. However, the French public is sceptical of the environmental commitments of all airlines. Only a quarter of French people (24 per cent) trust legacy airlines to be truthful about their environmental impact, while a larger portion, 38 per cent, express distrust. These figures suggest low levels of confidence in airlines' ability to reduce their environmental impact.

This has clear implications for campaigners focusing on "greenwashing" in France. Given that most of the public see through the environmental commitments of airlines, further campaigning to call out 'greenwashing' is likely to reinforce existing views rather than shift public opinion or increase public scepticism further.

This lack of trust in airlines also means there is room for other voices beyond the aviation sector to take a more active role in aviation policy debates and help those debates to move beyond the aviation industry alone.

How likely are you to believe an airline if they described their fuel as "sustainable"?

● Very likely ● Somewhat likely ● Don't know ● Somewhat unlikely ● Very unlikely



Using Destin Commun's segments, the Optimistic Pragmatists - a group that generally has high levels of trust - are the only segment more likely to trust than distrust an airline claiming its fuels are sustainable. This represents a challenge for behaviour change interventions given that Optimist Pragmatists fly most frequently of all the segments and are significantly more likely than average to take airlines at their word on sustainable fuels.

France's opportunity on plane to train

France is uniquely positioned to lead a transition from plane to train travel - with among the best high-speed rail network in Europe, and the proximity to some of Europe's most popular holiday spots.

Awareness that travelling by train is greener than flying is higher in France than in any of the other countries tested, but still stands at just under two-thirds (65 per cent), and awareness is lower among disengaged segments and with younger people.

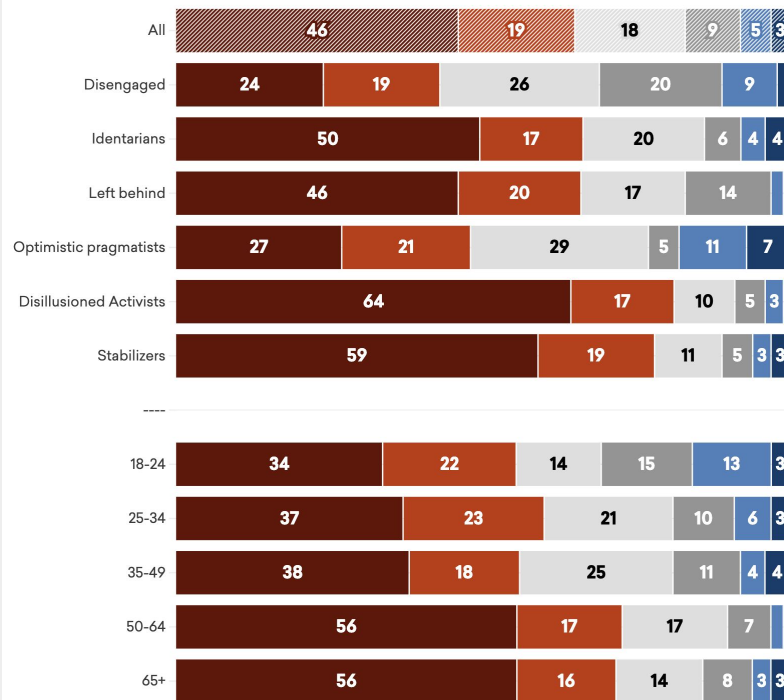
There is also low awareness about the favourable tax position of flying compared to train travel. Almost half (49 per cent) do not know whether trains are taxed more or less than airplanes, while a quarter (24 per cent) think that taxation is lower for trains.

Bringing costs of train travel in line with flights was the most popular measure we tested in France - but further public awareness on tax and environmental imbalances between the two modes of transport could help push this issue into the political mainstream.

The French Ministry of Transport have previously announced that plane tickets will be taxed additionally with the money invested in trains, but this plan was abandoned last September. Most French people seem willing to support any policy to make the train cheaper. There is space for policymakers to catch up with public opinion if they can also answer practical concerns about train reliability and make the case for more investment in the train network.

Compared to travelling similar distances by train, do you think flying is...

● Much worse for the environment
 ● Slightly worse for the environment
 ● Slightly better for the environment
 ● Much better for the environment
 ● Neither better nor worse for the environment
 ● Don't know



Short-haul ban - popular and could go further

There is strong support for the recent legislation banning the shortest domestic flights in France, with majorities saying the policy is a good idea in every segment apart from the Disengaged, where people are more neutral about the policy but not opposed to it. This polling shows, from a political perspective, the policy has been a success.

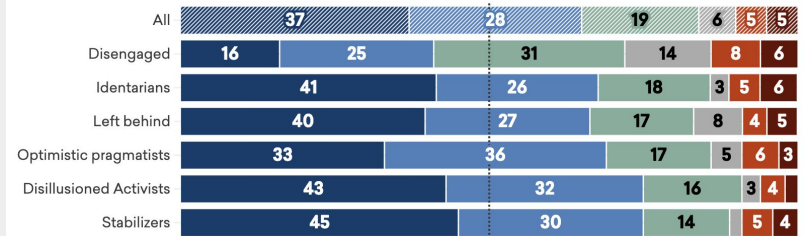
There is clearly an opportunity to build on this policy - a quarter of the public say it doesn't go far enough (compared to only 16 per cent who say it goes too far). Support is higher in both the Disillusioned Activists and Identitarian segments - driven by their support for stronger state intervention.

Focus group conversations in France showed that this was exactly the sort of policy on aviation that people were willing to support. Participants thought it was ridiculous that these flights were allowed to happen, and it made intuitive sense to put restrictions on them.

Finding other examples like these should create the political and policy space to be able to deal with more challenging aviation policy changes such as demand-side changes or individual behaviour changes. Investing more in alternatives should also limit backlash.

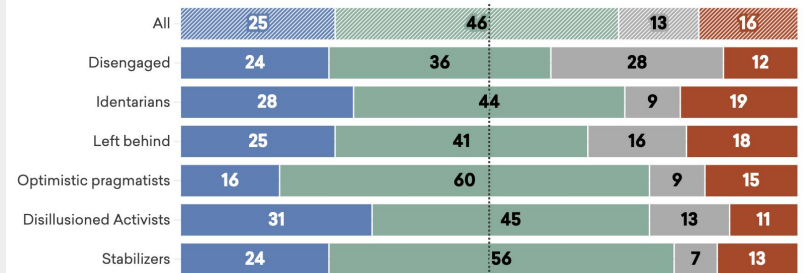
This year, the government passed a law banning domestic flights when there is a rail alternative lasting less than or equal to 2.5 hours.

Do you think this policy is a...
 ● Very good idea ● Somewhat good idea ● Neither a good nor bad idea
 ● Don't know ● Somewhat bad idea ● Very bad idea



And do you think this policy...

● Doesn't go far enough ● Is about right ● Don't know ● Goes too far



Targeting frequent flyers: Is *Liberté* at odds with *Egalité*?

While French citizens cherish individual liberty as a core value, this research finds a growing expectation for wealthier people to play a more substantial role in the green transition. The vast majority (81 per cent) of French people think that the government should introduce policies to reduce private jet emissions, including very restrictive measures such as super taxes or even prohibition of private jets (49 per cent).

This is in the context of a live media debate in France on private jets, including the PSG football team's use of one from Paris to Nantes, or the online tracking of private jet use by billionaire entrepreneurs, such as Bernard Arnault. More than half the French public think it is not appropriate for footballers or politicians to use domestic planes (53 per cent and 60 percent respectively).

Tackling frequent flyers on commercial airlines is more controversial, with the French public less supportive of this than any other country tested (receiving less than a third of public support). In focus groups in France, emotive freedom-based arguments against frequent flyer levies were raised unprompted and in ways not reflected in other countries.

Different segments have different hesitations about the frequent flyer levy. Identitarians feel more threatened by what they see as a potential restriction on their freedom, whereas Optimistic Pragmatists have more practical and less ideological concerns.

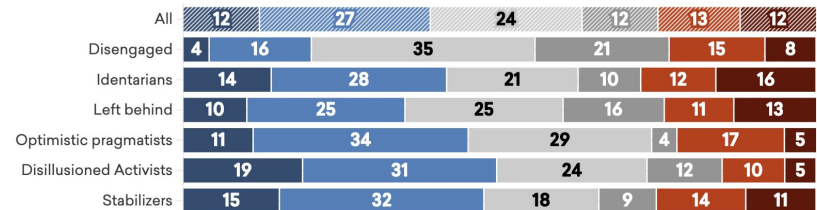
“France is supposed to be the country of freedom, I feel like we are no longer in France.”

“I make a lot of efforts elsewhere, I don't want to be made to feel guilty about the 2 or 3 times I take the plane each year.”

Some people have proposed a “frequent flyer levy”, whereby everyone is entitled to one tax-free flight per year, but subject to an increasing tax on every subsequent flight. The aim is to discourage frequent flying, and make those who fly more, pay more for the environmental impact of their flights.

In general, do you think this is a:

- Very fair policy
- Somewhat fair policy
- Neither fair nor unfair policy
- Don't know
- Somewhat unfair policy
- Very unfair policy



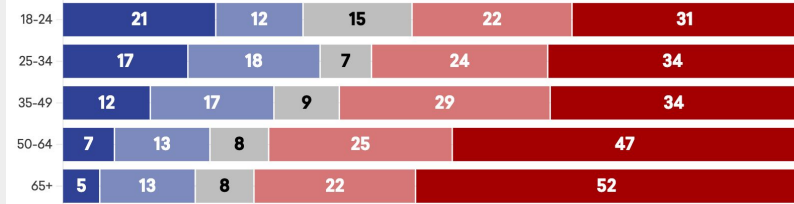
A French generation gap

Our findings in France challenge some preconceived notions about the age-related attitudes towards climate issues. Younger people in France (particularly 25-34 year olds) fly more than older generations and would use air travel more if money were not an issue.

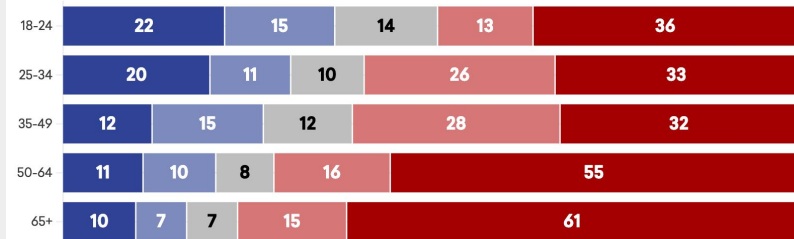
Asked about the negative impacts of not flying, 18-24 year olds are unique in selecting impacts on mental health above all else. While 29 per cent of the French believe that the most positive impact of not flying in the next five years would be reducing their environmental footprint, this figure drops to 10 per cent among the youngest demographic. The younger generation demonstrates a strong attachment to air travel for global exploration and cultural openness and are less supportive of restricting the number of flights per person with a total cap.

Young people's attitudes to climate and aviation are clearly nuanced - they are likely driven in part by a lack of awareness on the topics, as well as a broader aspiration to travel and see the world. This puts a particular premium on avoiding individual-guilt based approaches by campaigners to reduce aviation emissions, and further evaluation of how to manage these young people's desires to discover new places and cultures.

- 1 - It is more important to provide more opportunities for people to travel by air, even if this means increasing the environmental impact of air travel
- 2
- Don't know
- 3
- 4 - It is important to reduce the harmful effects of air travel on the environment, even if it means limiting air travel options



- 1 - To have a rich and varied life, you have to travel beyond France
- 2
- Don't know
- 3
- 4 - It is possible to live a rich and varied life in France without having to travel further



Germany

Navigating public opinion on aviation and climate

Additional analysis from [heimatwurzeln](#)

The German context

Fears of economic decline

73 per cent of Germans believe that Germany is on a downhill trajectory ([More in Common 2024](#)). GDP growth forecasts under the ruling traffic light coalition have significantly reduced from 1.3 percent to 0.2 percent.

Fears of the rise of right-wing populism

Current election polling ([Wahlrecht](#)) shows a continued rise in support for the far-right AfD party (18 per cent). Voting intention for the AfD has recently dropped by several percentage points, but the AfD remains the second strongest party. Large-scale demonstrations have also taken place in Germany triggered by reports of deportation plans.

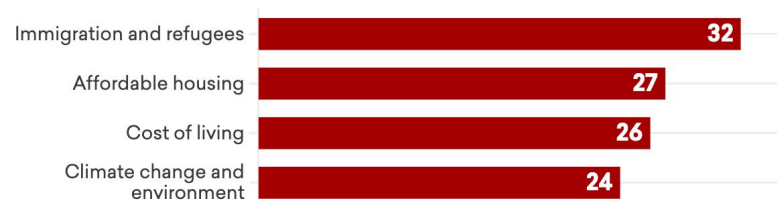
Fears of missing the train: Union strikes and other problems of Deutsche Bahn

In recent months, there have been several nationwide strikes led by the GDL (the union representing Deutsche Bahn employees). Only around a third of Germans now indicate support for the GDL strikes, while 59 per cent express no longer having sympathy for them ([Stern 2024](#)). Meanwhile, Deutsche Bahn is grappling with an aging rail infrastructure, manpower deficits, and the fallout from years of inadequate investment.

New austerity measures by the federal government

From May 2024, the ticket tax on flights will increase to nearly one-fifth. This was announced as part of a cost-saving plan to address the federal budget deficit. A separate tax on kerosene, which was also under consideration by the government, has been taken off the table. This tax would have affected all flights, including private jets, not just passengers. However, it faced strong opposition from airlines, who argued that it would further detract from Germany's attractiveness as a business location.

Germans' biggest issues (More in Common polling 2024):

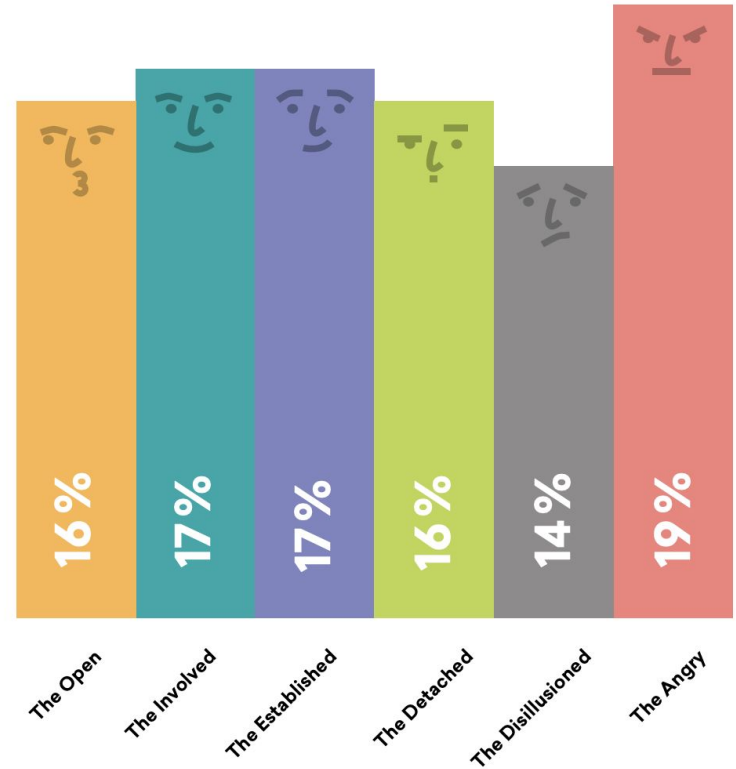


Germany's six segments - unique lens to understand German attitudes to aviation

More in Common Germany's six segments have been used as a lens to understand Germans attitudes to aviation. Summaries of the six segments are available here:

- **The Open** value self-expression, open-mindedness and critical thinking
- **The Involved** are civic-minded and active democrats, value togetherness, and are willing to defend progressive social achievements
- **The Established** value reliability and social harmony and are most likely to feel satisfied with the status quo
- **The Detached** value success and personal advancement and are less likely to think in abstract societal terms or to be interested in politics
- **The Disillusioned** have lost a sense of community and long for recognition and social justice
- **The Angry** value order and control in national life, are angry at the system, and have very low levels of trust

More information on these segments is available [here](#).



Emotional and practical considerations drive air travel among Germans

Nearly one in two Germans (45 per cent) have flown in the last three years – as in other countries, flying in Germany appears to be driven by a combination of emotional and practical motivations.

Among practical considerations, the benefits offered by air travel such as reduced travel times or the need to visit friends and relatives abroad featured most prominently. But flying is seen as more than mere transportation - it is associated with positive feelings such as calmness and happiness, and is often fueled by a quest for adventure, exploration and discovery.

For those opting not to fly, environmental concerns do not play an important role. Instead their decision seems to be influenced by the high costs associated with air travel and the perception of the benefits of alternative travel options such as reduced stress levels.

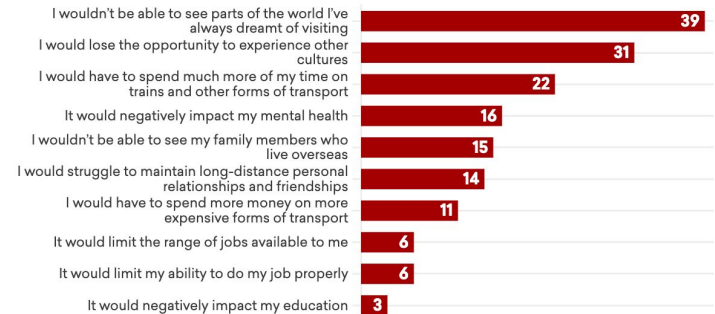
Given the emotional attachment to flying, messaging exclusively focused on rational appeals or blame should be avoided. Instead, the focus should be on strategies that emphasise the co-benefits of alternative transport modes and their potential to meet the desire for discovery and adventure - this approach is more likely to encourage a shift away from air travel without triggering backlash.

We used to fly to Spain with the whole family. Nowadays we drive there, because flying is just too expensive.

I get a lot out of traveling, even if it's just for a week, [...] getting out and flying into the sun in the winter.

Focus Group Participant, Germany

And if you didn't fly for the next five years, which of the following would have the most negative impact on your life? Select up to three answers.



Flyers are more reluctant to support measures to reduce air travel emissions than non-flyers

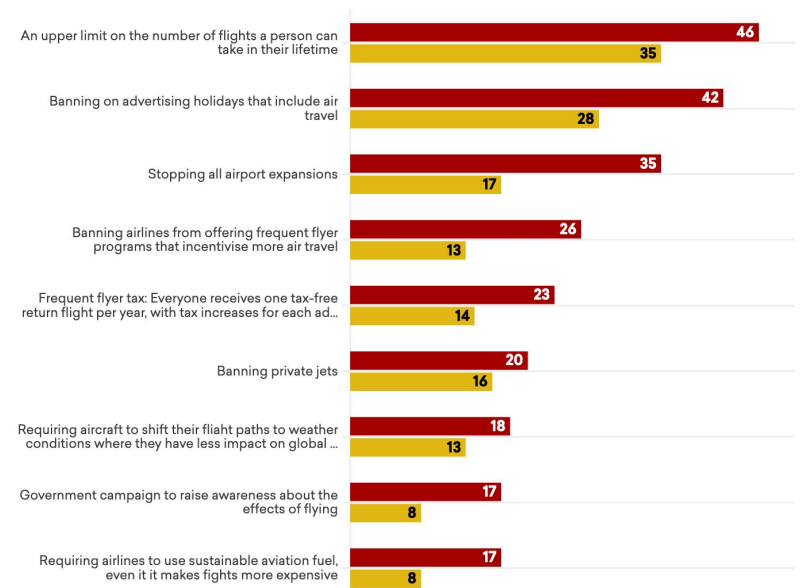
In Germany, flyers and non-flyers share similar demographic characteristics, although flyers tend to be slightly younger (on average 5 years younger), more likely to live in urban areas and less likely to live in rural areas. They are also more likely to have relatives abroad. Flyers tend to have higher incomes and higher levels of education. However, values, political ideology, and climate concern do not significantly differentiate between flyers and non-flyers in Germany.

Attachment to flying is higher among flyers than non-flyers in Germany, and flyers would like to fly more frequently. Nearly half of flyers (47 per cent) say they would fly more if time and money were not constraints. Furthermore, flyers are more opposed than non-flyers to various policies aimed at reducing flying emissions, such as capping the lifetime number of flights per person or halting the expansion of airports.

Given that flyers represent around half of the German population (45 percent have flown in the last three years), it is important to be aware of the potential for backlash from strategies focusing on “flight shame”.

Proportion of Germans opposing various measures on aviation

Have you taken a flight in the last three years? ● Yes ● No



The potential for increased awareness

While awareness of the environmental impacts of flying is comparatively higher in Germany than in other countries, there is room for further awareness.

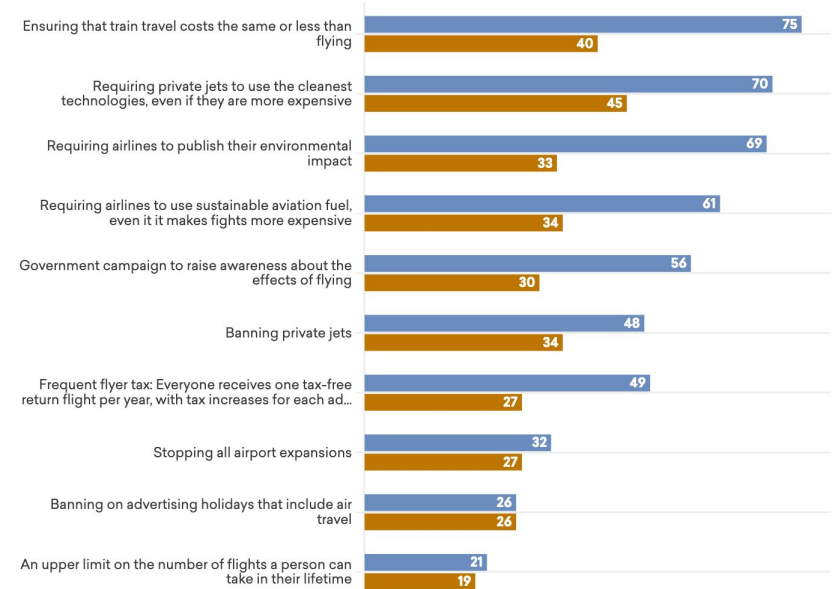
One in four Germans do not know that flying is more harmful to the environment than travelling by train, and less than half are aware that environmental damage from air travel has increased in the last decade.

The results show that increased awareness correlates with heightened disapproval of flyers, as well as greater support for policies aimed at reducing flying emissions. While these findings show that awareness can be a means to shift public attitudes, there are limits to its effectiveness as a strategy. Increased awareness does not necessarily translate into a greater likelihood of changing one's flying behaviour, and certain policies still face significant opposition among those aware of the environmental impacts of flying.

Awareness campaigns should also be aware of the high emotional attachment to flying among Germans. Appeals to rationality should be complemented with emotional considerations to effectively engage the public.

Proportion of Germans supporting various measures on aviation

- AWARE that planes cause more emissions than trains
- UNAWARE that planes cause more emissions than trains



Making trains affordable and reliable

Measures aimed at promoting and supporting train travel emerge as the most favoured policy for Germans. A significant majority (63 per cent) believe that the government should make train journeys the same cost, or cheaper than, flights on the same routes.

Nearly three in four Germans (73 per cent) also support lower taxes on train tickets compared to flights. This policy attracts widespread support across ideological groups (being the most popular policy option among left and right voters, 58 per cent and 73 per cent), as well being supported by flyers and non-flyers (66 per cent and 59 per cent).

However, focus group discussions revealed broad discontent with the current service offered by the Deutsche Bahn. Participants highlighted concerns about the considerable time trains take and the higher likelihood of delays and cancellations.

Some participants also expressed skepticism about the capacity of the train network to accommodate more travelers, citing perceptions of overcrowding and limited capacity.

"I think it would be great if the trains worked in such a way that they represented an alternative, that would actually be the optimal thing, but I think that doesn't work, which is why I find it problematic."

Focus Group Participant, Germany

While there is strong support for promoting train travel, these insights underscore the importance of addressing underlying systemic problems related to reliability and capacity to make train travel a more viable alternative to flying. Enhancements in these areas could bridge the gap between public sentiment and practical considerations and encourage more sustainable travel choices.

Develop campaigns focusing on elites leading by example

Public sentiment towards air travel policies reveals support for policies which target the elite, while considerable opposition arises for measures which affect regular flyers.

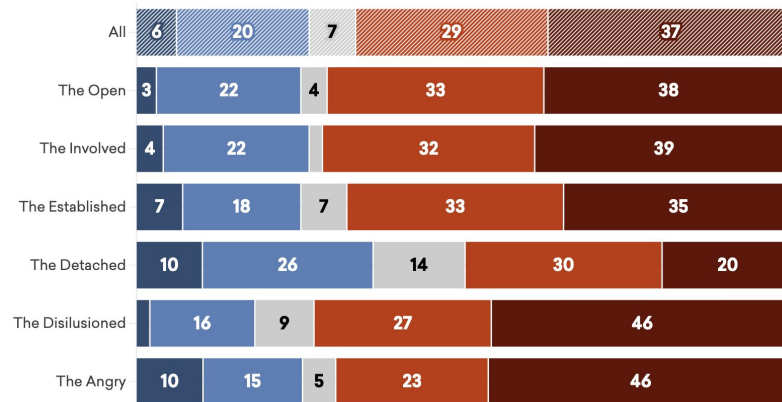
While policies like individual lifetime caps on flights face strong opposition, a significant majority back restrictions on private jets to curb emissions. Focus group discussions reveal widespread frustration and anger towards lifestyle of “elite” flyers - policies targeting these groups of flyers face strong consensus and low opposition. Elite flyers, including private jet users and first-class passengers, are perceived as fair targets for bearing the responsibility and cost of transitioning to greener air travel, with support at least twice as high for targeting these flyers rather than a blanket approach.

Politicians face widespread condemnation for frequent flying, with about two-thirds (66 per cent) of Germans advocating for reduced air travel among these figures. Campaigns urging the elite, especially politicians, to lead by example could enhance public trust in climate efforts and shape attitudes towards more sustainable travel practices.

The Detached segment is less opposed to private jets usage than other segments (although still opposed overall) - this is due to the higher value they place on individual success and accomplishment.

When politicians travel within Germany, do you think it is more appropriate for them to...

● Always travel by plane ● Sometimes travel by plane ● Don't know ● Rarely travel by plane ● Never travel by plane



"I still remember Lindner's wedding [German finance minister], it was celebrated with great press fanfare on Sylt and all the A, B and C list celebrities flew there with that thing [private jets]. That was just unbelievable for me."

Focus Group Participant, Germany

Less enthusiasm for flying than other countries

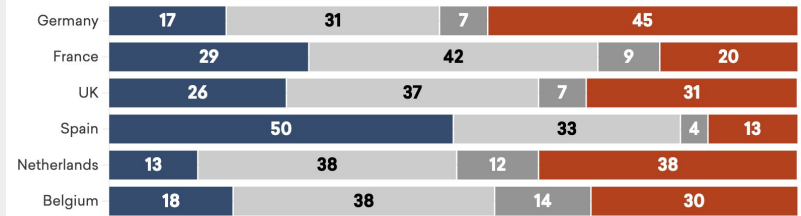
Germans are consistently the least positive about flying compared to the other countries tested. They are both more negative about the increase in global air travel (45 per cent view it as a bad thing, 17 per cent as a good thing), and more optimistic that the economy can grow without aviation industry growth (73 per cent). Only 16 per cent say that flying more is essential for economic growth.

Germans are more likely to identify the benefits of not flying on their lives than the drawbacks. 44 per cent can see the benefit of saving money, 32 per cent see the positive aspect of reducing their environmental impact, and 19 per cent see the opportunity to have more time to explore their own country. This makes Germany the only country in this study where campaigns around voluntary behaviour changes might resonate.

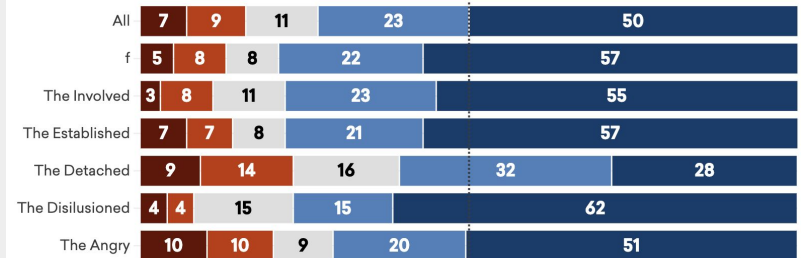
While other countries have more positive views about the experience of flying, Germans are more ambivalent. In Germany, flying is likened to a kind of treat - enjoyable with a certain allure and status. Few see it as a personal essential or a societal necessity, though many are reluctant to give it up, as it can often be the main highlight of the year. Germans are particularly opposed to bans, although most agree that it would probably be better for everybody to fly less.

The rise of low-cost airlines and increasing incomes of people in wealthy countries has meant that people are now flying around the world more than ever before. Given this, which of the following comes closest to your view?

People flying around the world now more than ever before is...
 ● Broadly a good thing
 ● Neither a good nor a bad thing ● Don't know ● Broadly a bad thing



● 1 - People flying more is essential for economic growth
 ● 2 -
 ● 3 -
 ● 4 - The economy can grow without people needing to fly more



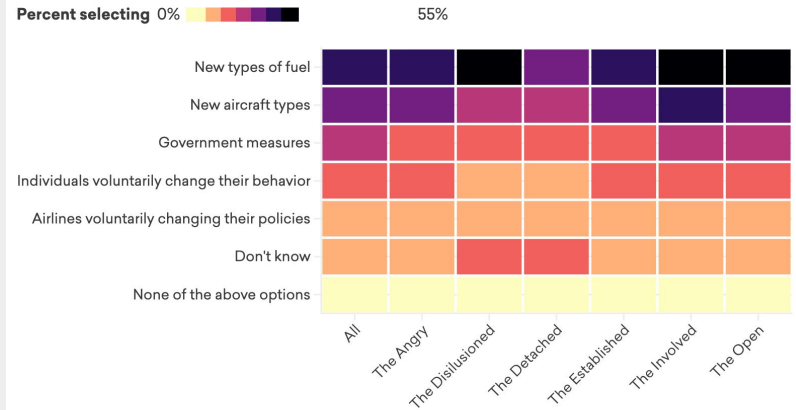
Individual behaviour change strategies are likely to have limited impact

Less than one in five Germans (19 per cent) claim to have flown less due to concerns about the environmental impact, including around only one in ten (10 per cent) who have completely stopped flying. This is more than any other country in this study, but remains relatively low.

Despite this, there is little hope that a “flight shame” approach could have a significant impact in Germany. Of the seven in ten (68 per cent) Germans concerned about climate change, fewer than half (43 per cent) translate this concern into actual behavioural change. Few Germans see the point in individual behaviour change, with less than one in five (18 per cent) believing it will play a big role in reducing emissions over the next 10 years.

The clear implication of this work is to shift from individual behaviour change strategies and focus more on political frameworks. A range of policy areas tested - including plane to train policies, cleaning up private jets and mandating greater transparency from airlines - command more than 50 per cent support from the German public

Which of the following aspects do you think will play the biggest role in reducing the climate impact of aviation over the next decade? Choose two answers



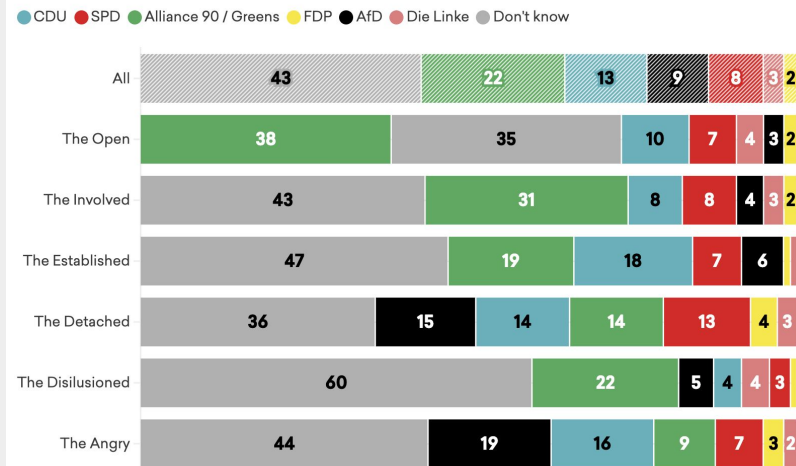
Navigating aviation in German politics

Germans have little confidence in any party to get the environmental impact of flying under control. Asked which party they trust the most, five out of six segments say they “don’t know”. Only the Open - the most politically engaged segment and strongest supporters of the Alliance 90 / Green parties - identify a party as best placed to deal with the environmental impact of aviation.

For the Open, and three other segments, the Alliance 90 /Green parties are seen as the most trusted to deal with the environmental impacts of flying, although levels of enthusiasm vary. At one end of the spectrum is the Open, 38 per cent of whom trust the Greens, whereas trust is only at 19 per cent for the Established.

For the Detached and the Angry - the two most right leaning segments - the AfD are the most trusted party, although trust in all parties is low. These two segments place low trust in politicians to deliver change, and are more likely to place their trust in parties not seen to embody the “establishment”.

Who do you trust the most to best deal with the environmental impact of flying?



Spain

Navigating public opinion on climate and aviation

Additional analysis from [Legados](#)

The Spanish context

An unstable government:

The current government, a coalition of PSOE and Sumar, relies on the support of many nationalist and independentist parties. This creates an environment of political instability, with the government avoiding the presentation of a budget this year, and limited discussions on public policy.

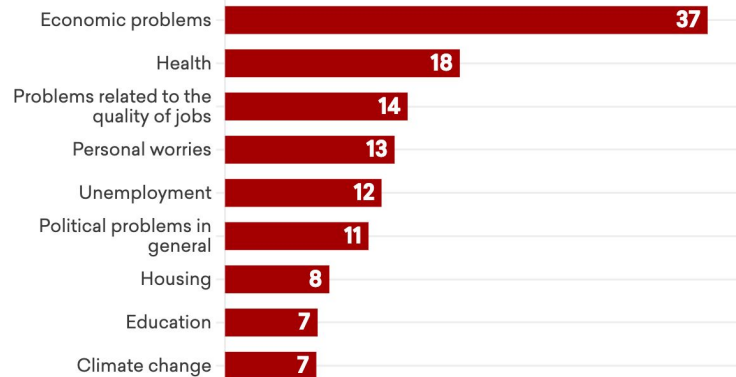
Institutions in the time of anti-politics

A recent [poll by Ipsos](#) showed that 72 per cent of Spaniards do not trust politicians, only trailing Poland, Hungary, and Romania. A poll by the CIS shows that only the Constitution is perceived as a trustworthy institution (6.59 out of 10 points), while judges (4.98), Parliament (4.5), government (3.99), trade unions and political parties (3.82) are heavily criticised, with Spaniards declaring that they trust them even less than five years ago.

The rising tide of polarisation:

Recent research (Giron et al, 2019; Rodríguez et al, 2022) shows that Spain is one of the most polarised countries in Western Europe. Although it is mainly driven by support for the preferred party instead of dislike for the other (Miller, 2023), it creates difficulties for setting up cross-bloc alliances and making progress on depolarisation.

Spaniards' biggest issues (CIS public opinion barometer 202):



It's the economy, Spaniards:

The latest public opinion barometer of the Centre for Sociological Studies (CIS) showed that the three main concerns of Spaniards are the economy, their health, and the lack of well-paid jobs. Even though Spaniards care about climate change in absolute terms, the CIS poll suggests that this concern gets overshadowed by other grievances, with only 7 per cent of the population considering climate change one of their top three problems.

Spanish enthusiasm for flying

Out of all of the countries tested, Spain stands out for its particularly positive views about aviation and air travel. It is the only country where a majority (70 per cent) of the public have travelled by plane in the last three years.

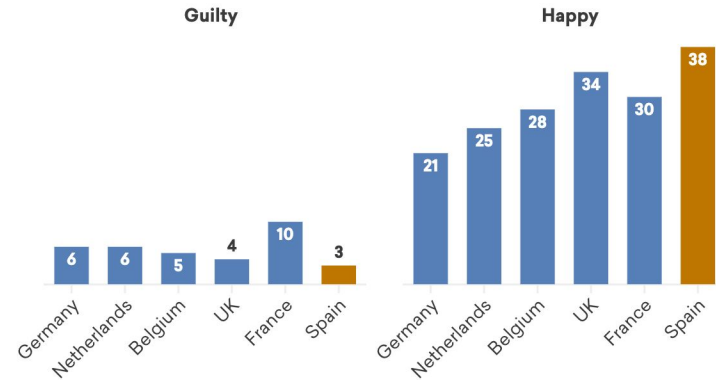
Spanish air travel preferences are particularly distinctive when it comes to domestic travel habits. While car travel remains a popular transport choice for almost half of Spaniards (48 per cent use cars for the longest part of their domestic travel), planes are the longest part of their journey for a third of Spaniards (32 per cent) - a figure two to three times higher than the averages seen in other countries. Train travel, on the other hand, is chosen for the longest part of their journey by just over one in seven (14 per cent).

This higher likelihood to fly translates to more pro-flying attitudes in Spain - a country where flying shame is at its lowest (only 3 per cent say they feel guilty when they fly) and where most groups are likely to see flying as a necessity.

These attitudes, in turn, lead to greater scepticism about certain policies. For example, Spain is the country most opposed to a frequent flyer levy, a cap on the number of flights each person can take, or a requirement that all airlines use more expensive SAFs.

However, this strong enthusiasm for flying does not mean that Spaniards don't want government action. Concern about climate change is high in Spain (higher than in any of the other countries), as is demand for the government to help people transition to more sustainable modes of transport.

When you fly, which of the following words best describe how you feel? Select all that apply.



The islands

The Canary and Balearic islands play a significant role in shaping Spanish attitudes to aviation. It is not simply the case that people living on the islands are more opposed to restrictions on aviation, but rather those with families split between the islands and the mainland are more opposed to these restrictions and more positive about flying in general.

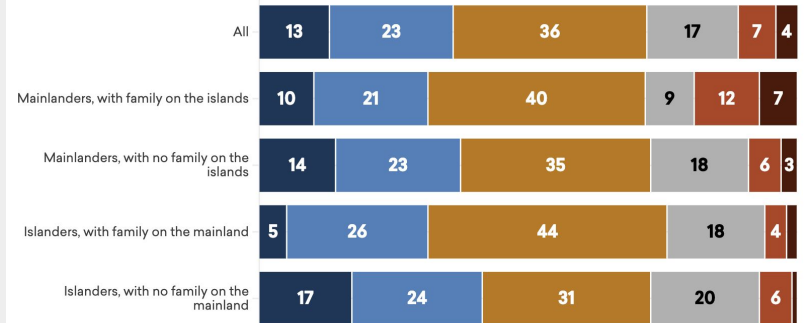
For example, those with families split between the islands and the mainland are less likely to say that airlines do too little on their environmental impact - perhaps because they fear that any further action could limit their ability to see family.

Despite this, it is important not to read too much into these differences. Political divides are still much more important in Spain than geographical divides when it comes to attitudes to environmental policies.

However, there is some opportunity to persuade these groups about the benefits of flying less - people with family split between the islands and mainland are twice as likely to say that stopping flying would be an improvement to their life - perhaps because they see travelling as an expensive and stressful necessity, rather than an exciting holiday treat.

In general, do you think that airlines are doing too much, not doing enough, or doing about the right amount to reduce their impact on the environment?

● Doing far too little ● Doing too little ● Doing about the right amount ● Don't know enough to say
● Doing too much ● Doing far too much



Tourism and aviation

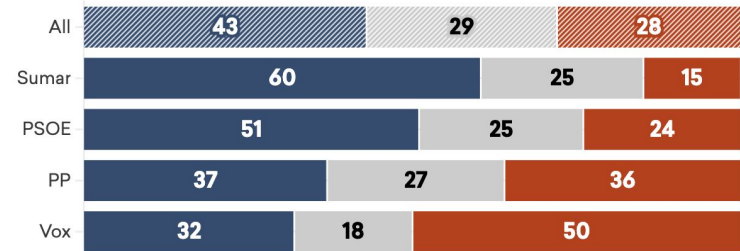
The economic importance of tourism in Spain might explain the differences between Spain and other countries on air travel. However, data from the study does not clearly support this argument: 59 per cent think the economy can grow without people flying more and only 28 per cent think that Spain should push to increase tourism arrivals even if that has a negative impact on the environment.

Qualitative research reveals mixed feelings on tourism as well. On the one hand, participants were conscious about the environmental impact of the tourism industry, especially in the islands. On the other hand, there was some ambivalence regarding whether airports should be expanded given the economic importance of tourism in Spain.

"It occurs to me, living in Ibiza, which is a very touristy destination where there can be 3000 flights in a weekend, that local actions should be taken to improve the environment of the area, because there are destinations where it has a greater impact than in other places..."

Which of the following do you think is more important?

- Reducing the number of flights into Spain to protect the environment, even if it means fewer tourist arrivals
- Don't know
- Increasing the number of tourist arrivals, even if it means growing the climate impact from flights



"In summer in Mallorca the population doubles and that also influences the environment and there is no need to make the airport bigger because more and more people will come and we will not be able to live and you cannot enjoy things or you will enjoy them badly..."

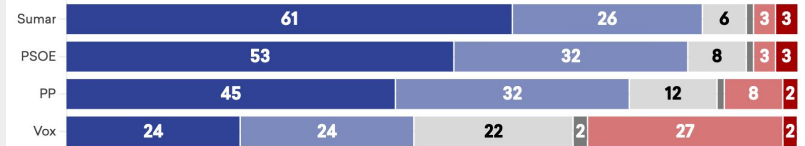
Climate and aviation priorities: ideological divides

Both qualitative and quantitative research shows that people in Spain do not necessarily prioritise tourism growth over environmental protection (43 per cent see the need to reduce the number of flights into Spain to protect the environment, even if it means fewer tourist arrivals).

However, there are clear splits on ideological lines. Environmental protection is prioritised mostly by left-wing voters. More than half of PSOE voters (51 per cent) and Sumar voters (61 per cent) think protecting the environment is more important, while only a minority of PP and Vox voters think the same (37 per cent and 32 per cent respectively).

More broadly, while voters of all parties say they are worried about climate change, there are clear differences in how each group of voters think the transition should happen. More liberal voters accept that there may be tradeoffs in lifestyle or economic growth to reach net-zero, whereas PP and Vox voters are less willing to accept downsides to any policy trade-offs.

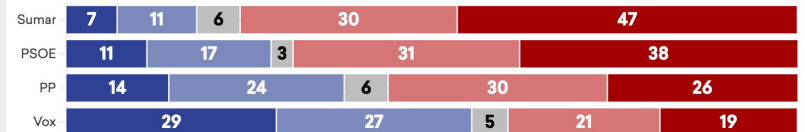
How worried are you about climate change? ● Very worried ● Somewhat worried ● Neither worried nor unworried ● Don't know ● Somewhat unworried ● Very unworried



● 1 - Tackling climate change will mean we all have to make sacrifices in the things we currently buy and do
 ● 2 -
 ● 3 -
 ● 4 - We can tackle climate change without having to make sacrifices in the things we currently buy and do



● 1 - It is important that we provide more opportunities for people to travel the world by plane, even if it means a more harmful environmental impacts
 ● 2 -
 ● Don't know
 ● 3 -
 ● 4 - It is important that we reduce the harmful environmental impacts from aviation, even it means limiting opportunities to fly



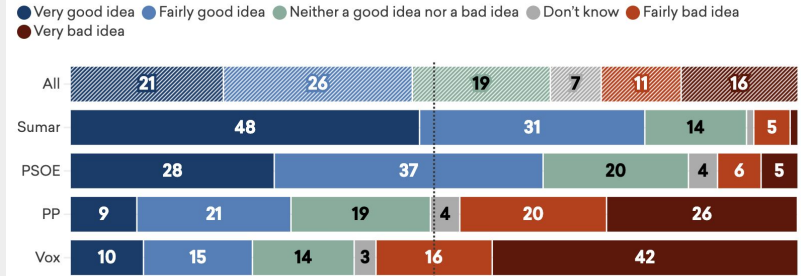
Short haul ban: popular, but little space to go further

The proposed - though yet to be enacted - ban on short-haul commercial flights has limited opposition in Spain, particularly among voters of the PSOE-SUMAR coalition, who introduced the policy. In qualitative research the ban made logical sense to participants who felt there was no need to take a flight for journeys that could be done as quickly by train.

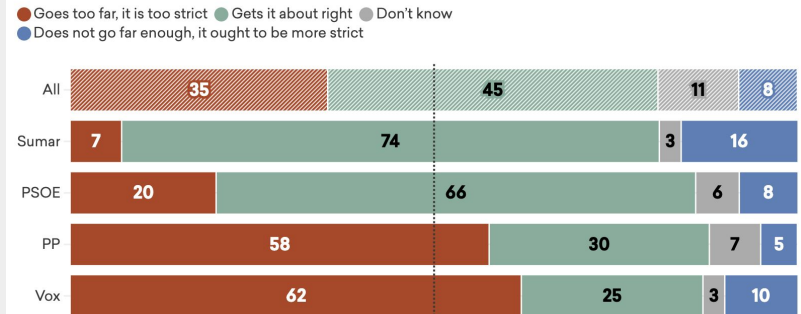
A plurality of Spanish people think that the policy is about right in terms of scope. However, unlike in France where the enacted policy remains popular, Spanish people are more likely to say that the proposed policy is too strict - perhaps in part due to the fact that the French policy had many more exemptions and the different points of the policy-making cycle. This means that, while the policy is unlikely to cause meaningful backlash as it stands, there seems little scope to go further with the banning of short-haul flights over longer distances in Spain, beyond what is currently being proposed.

Qualitative research suggests that this is, in part, due to a lack of practical train alternatives.

The proposed PSOE - SUMAR coalition agreement includes a pledge to ban commercial flights within Spain where there is a train journey that takes 2.5 hours or less. Thinking about this proposed plan, do you think it is a....



And do you think this policy...



Netherlands

Navigating public opinion on
aviation and climate

Aviation - a way through the Dutch climate backlash?

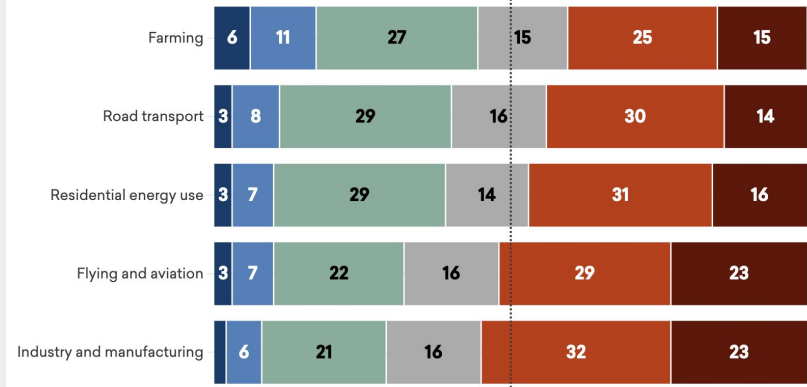
Despite the Dutch public's strong concerns over the impact of climate change, high-profile backlashes on climate policies in other industries - such as farming - has stalled progress on other green initiatives in the Netherlands, and emboldened anti-climate populists.

However, aviation is one of the very few industries where the majority of Dutch people think that the government is not doing enough on the environment. As such, to the extent that there are opportunities to pursue tougher environmental policy in the current political environment, aviation seems to be one potential area where this could be achieved.

Given the backlash in other sectors, campaigners and policymakers should be cautious about introducing a new industry into the climate debate. However, the research shows that a campaign based on making the polluters pay - and starting with popular policies - may help gain the trust of voters and set an example for how the green transition could be managed better in other industries.

For each of the following industries and areas, do you think the government is doing enough, doing about the right amount, or not doing enough to reduce its environmental footprint?

● Doing far too much ● Doing too much ● Doing about the right amount ● Don't know ● Not doing enough ● Not doing nearly enough



Strong demand to make polluters pay on aviation

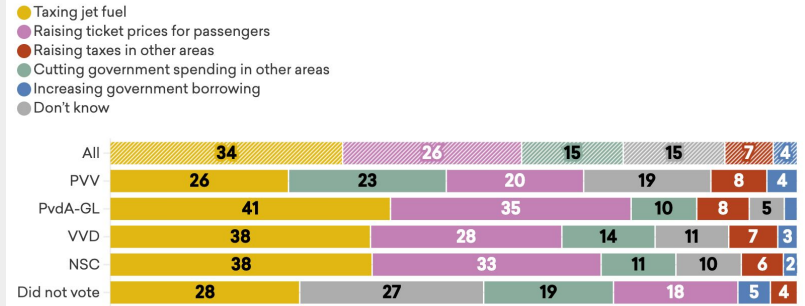
There is a clear sense in the Netherlands, stronger than in other countries, that polluters ought to be paying for their own emissions. More than any other country in this study, Dutch people want the green transition to be paid for by taxing jet fuel, or raising ticket prices for passengers, rather than coming from general government spending.

This holds up across voters of all major parties, although PVV voters are more likely to favour paying for this transition through cutting government spending elsewhere.

This “polluter pays” sentiment is visible in the Netherlands’ responses to questions about a frequent flyer levy. Dutch people are most likely to say that the levy would be effective and fair, and most likely to support the policy in general, with solid support spanning across all voter groups.

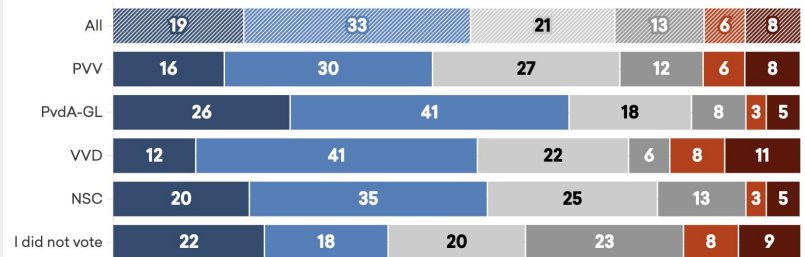
That said, awareness of the frequent flyer levy is low in the Netherlands, and many people are undecided. Proponents of this policy in the Netherlands need to be proactive because there is clear space for opponents to shape the narrative on the operation of the levy while awareness is low.

Reducing the harmful environmental impacts of flying will cost money and need to be paid for either by passengers, taxpayers or businesses.



In general, do you think [a frequent flyer levy] is a:

- Very fair policy
- Somewhat fair policy
- Neither fair nor unfair policy
- Don't know
- Somewhat unfair policy
- Very unfair policy



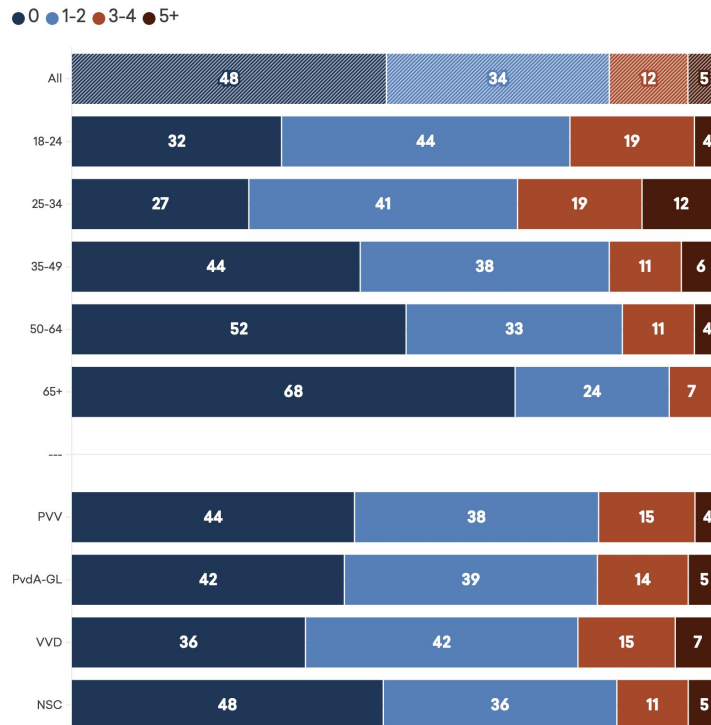
Flying behaviour by voter group

Flying behaviour in the Netherlands follows a similar age pattern compared to other countries - with younger people flying the most and 25-34 year olds being the age group with the most frequent flyers.

Flying is particularly rare among the oldest age groups, with 68 per cent of 65+ year olds having not flown in the last year.

In contrast, the Netherlands differs from the other European countries by the extent to which flying behaviour varies by party affiliation. Whereas in other countries, some party affiliations are associated with more frequent flying behaviour than others, in the Netherlands, flying behaviour is fairly consistent across voter groups.

Number of return flights taken in the last year (modelled based off responses to a range of questions)



Belgium

Navigating public opinion
on aviation and climate

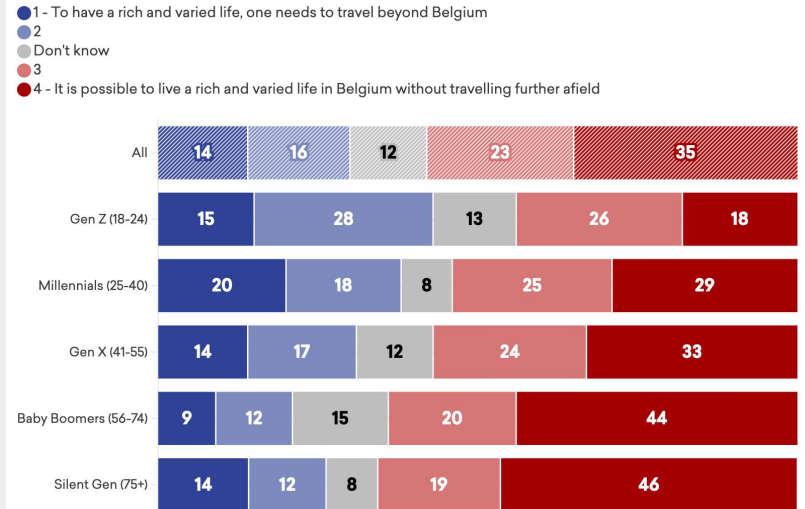
Small country syndrome

More so than any of the other countries in this study, many Belgians think that leaving the country is essential to having a rich and varied life - a view particularly true of younger Belgians.

Exploring this sentiment in focus groups, some suggested that the small size of the country means it is almost inevitable that a Belgian will end up leaving fairly frequently throughout their life, and this sense of inevitability seems to affect many Belgians' thinking when it comes to decarbonising aviation.

That said, Belgium's relatively small population, but extremely busy airports, means that one of the real policy challenges in the country is not about the travel behaviours of Belgian citizens, but of connecting passengers who are using Belgian airports for longer journeys.

Awareness of the role Belgium plays in international aviation was low in qualitative research, and there is no clear sense of how comfortable Belgians would be with the government taking action on connecting flights. However, some domestic policy opportunities were identified in the research.



Testing recent Belgian aviation developments

A number of recently introduced or proposed policies were tested in Belgian focus groups, including:

Banning “flea hop” flights

The idea that anyone was taking domestic flights within Belgium was surprising to all focus group participants, and there was near-unanimous support for banning them - it is difficult to imagine any political backlash to an outright ban on domestic flights in Belgium.

€2 to €10 tax to discourage short-haul flights

Participants broadly understood the idea behind this tax, and thought it was an interesting initiative (even if they had not heard of it before). However for many participants, this was the worst of all worlds - not seen to go far enough to have a significant impact, but still significant enough to be an annoyance.

Increased taxes on private jets

Very few had heard of this policy, but welcomed the idea. There is opportunity for increased communications on this idea to show how the government is making the wealthy shoulder the costs of the green transition - for example by investing the revenue from this tax in green transport infrastructure that will benefit everyone.

Crackdown on noise pollution from Brussels airport

Even though this has been a heated debate for those who live around the airport, participants in these groups did not have strong opinions about this measure. They sympathised with local residents but also thought that their complaints could not come at the expense of the country's most successful airport - they didn't want the government to go any further.

Flying behaviour by Belgian voter group

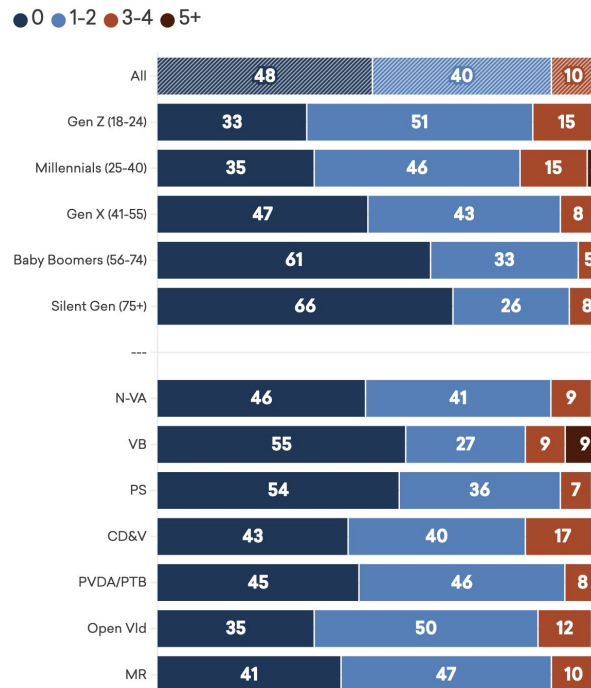
As in all other countries, younger people are much more likely to fly in Belgium than older people, with 25-40 year olds the most likely to fly frequently.

Unlike other countries in Europe, personal income in Belgium seems to have less of an impact on flying behaviour - suggesting that in Belgium flyers are less price sensitive.

There is some variation in flying behaviour by voter group - with 55 per cent of the right-wing VB party voters having not flown in the last year (in part explained by this voter group's slightly older age profile), compared to 35 per cent of the centre-right party Open Vld's voters.

There are no significant differences in flying behaviour between French and Flemish speaking Belgians.

Number of return flights taken in the last year
(modelled based off responses to a range of questions)



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