

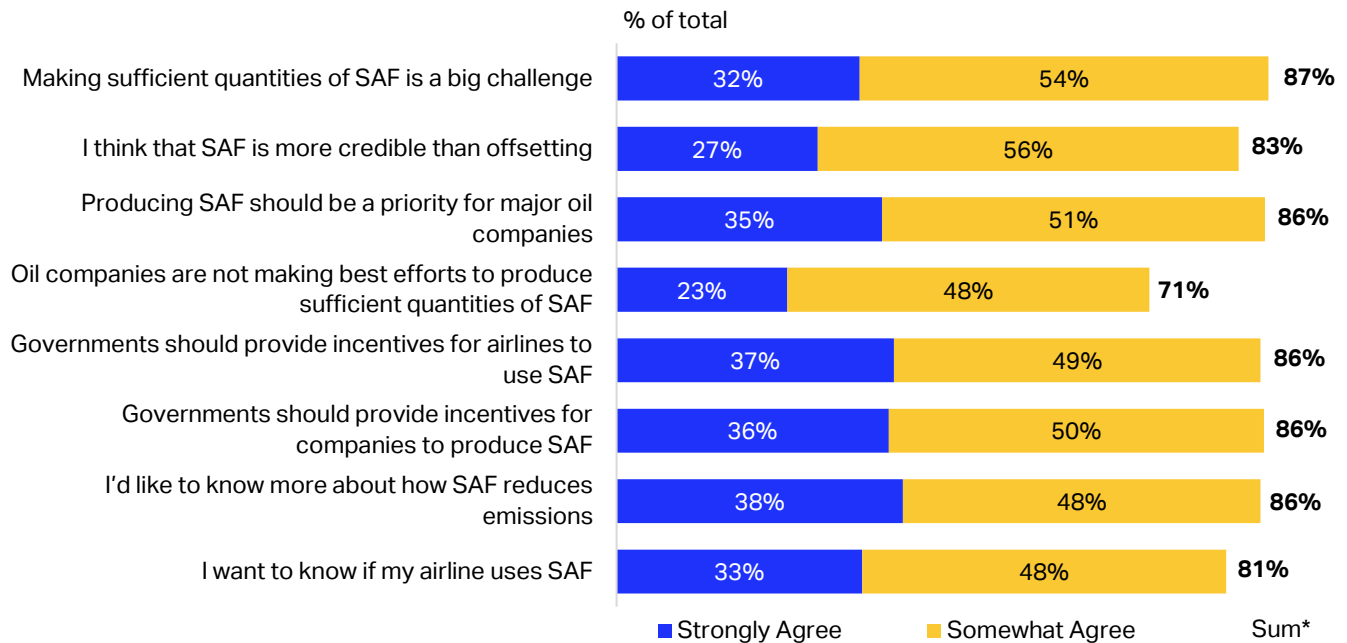


Chart of the Week

12 July 2024

Air travelers' views on SAF highlight a range of issues

Traveler perceptions of Sustainable Aviation Fuel (SAF)



Source: IATA Passenger Survey; *Totals may not add up due to rounding

Note: 6,500 recent (in the last 12 months) airline travelers were surveyed between 29 March and 14 April in Australia, Canada, Chile, China, France, Germany, India, Indonesia, Japan, Singapore, Spain, the Netherlands, UAE, UK, and USA. Panels were provided by Dynata with analysis by Savanta.

- Sustainable Aviation Fuel (SAF) is a key lever in the airline industry's decarbonization efforts, however, air passengers' views on SAF highlight a number of challenges that lie ahead.
- Firstly, passengers understand the magnitude of the task to ramp up SAF production as quickly as possible, from its current low level. SAF accounted for just 0.2% of total aviation fuel use in 2023 and, although supply is increasing, it is expected to rise only to 0.5% in 2024. 87% of those surveyed agreed with the statement that making sufficient quantities of SAF available is a key challenge for the industry.
- Consumers consider that both oil companies and governments have a responsibility to address this issue; 86% of respondents noted that SAF production should be a priority for the major oil companies, and 71% agreed that oil companies should do more to produce SAF in larger quantities. Passengers also concurred that the role of government policy is critical in helping establish sufficient SAF supply and incentivizing airlines to use SAF, at 86% of respondents for both questions. Without a supportive policy environment, scaling SAF production, and achieving aviation's decarbonization more broadly, becomes increasingly difficult. At the same time, 81% of air travelers expressed a willingness to understand whether their airline uses SAF and 86% want to comprehend exactly how SAF reduces carbon emissions.
- These results suggest that the air transport industry – including key stakeholders such as oil companies and governments – needs to be mindful not only of the operational challenges of SAF but to also ensure that passengers and the public more broadly have the information necessary to make informed decisions in relation to aviation's sustainability transition. This need is heightened by the critical role of SAF in aviation's decarbonization.

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