



## **Global TGI Barometer**

### **Issue 25: Flying: The Environmental Debate**

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In recent years airlines have represented one of the fastest growing business areas in many countries and planned expansion of airports could result in the number of flights from countries such as Britain trebling within the next decade or so.

Yet recent influential reports have highlighted air travel's contribution to climate change and as a consequence some are predicting that opinion on flying will experience a turnaround. Using the latest TGI data from across the world, we examine consumer behaviour and attitudes towards air travel, and what this could mean for airlines today.

#### **Flying Consumers**

Consumers are flying more than they ever have. In Britain, 53% flew in the past year, compared to 41% in 2001. Other countries such as Northern Ireland and New Zealand have similarly high levels of air travel (49% and 46% respectively). However, flying is much less common in Eastern European countries such as Hungary and Slovenia, where only 4 and 11% of people took a flight in the past year.

#### **In for the Short Haul**

Environmentally, the good news is that these consumers are generally not flying frequently; in Germany, for example, 93% of those who flew in the past year took just one or two flights. However, a relatively high proportion of these flights tend to be domestic or short haul – something for which airlines are increasingly becoming subject to scrutiny. For example, in Sweden, 44% of those who flew did so within their own country, and even in a country as small as Britain, nearly a quarter of flyers took at least one domestic flight and two thirds took short haul flights within Europe.

#### **Greener Travel**

Other methods of transport may be lauded as more 'green', but the data shows that consumers just aren't convinced. For example, only 4% of Britons took a train to their last holiday, and only 6% a coach – figures were similarly low throughout Western Europe. These methods are more heavily used in parts of Asia however; 39% of Chinese holiday makers travelled by rail on their last trip.\*\*

#### **The Price Priority**

Experts are predicting that budget airlines in particular will need to switch their marketing focus from rock bottom fares to environmental responsibility, if they



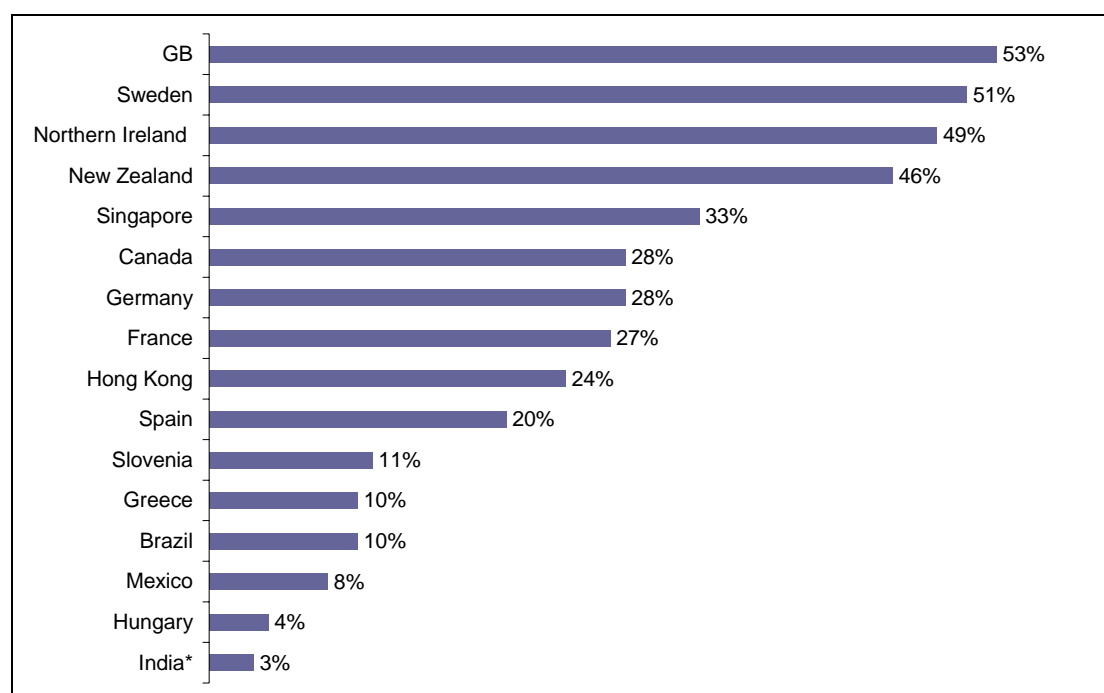
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wish to survive. But they may have a hard time convincing consumers; TGI data shows that price is an overwhelming priority for most – for example, 41% of Spanish flyers cite this as their main reason for choosing an airline, compared to only 2% who believe that company policy or image would be the deciding factor.

### Environmental Attitudes

However, there may be some hope for airlines looking to re-image by marketing their 'green credentials'. For example, 74% of Brazilian and 69% of Canadian flyers said that they would be willing to pay more for environmentally friendly products and perhaps – by extension – plane tickets. Flyers in France look like they will be harder to win over however; 69% believe that there is too much concern with the environment.

### % travelled by plane in the past year



\*Indian data from ABC socio-economic groups in 40 urban centres, \*\*Chinese data from 30 main cities

Base: Individuals aged 18+

Source: Global TGI



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**Editors' Notes**

The Global TGI network operates single-source consumer and media studies in over 50 countries worldwide. Used by brand owners, media owners and agencies, it measures consumers' product and brand usage, media consumption and attitudes, based on large samples - over 700,000 respondents annually worldwide. A typical survey will cover around 4,000 brands and 500 product categories.

TGI was originally developed in the UK by BMRB, one of the UK's leading marketing research companies. The first survey was conducted in 1969 and for the past 37 years BMRB has continued to market the service in Great Britain. BMRB is part of the KMR Group, which markets TGI globally.

KMR Group is a division of the Millward Brown Group, part of Kantar, WPP's insight, information and consultancy division. For more information, visit [www.kmr-group.com](http://www.kmr-group.com)