

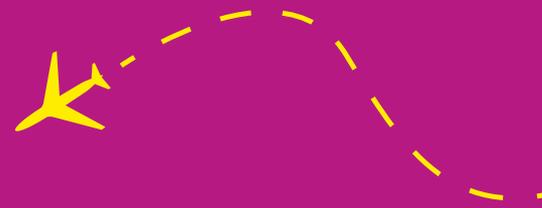
World Travel Catering  
& Onboard Services

EXPO



# A Greener Passenger Experience, A Smarter Airline Strategy

Insights into passenger perceptions of sustainability across airlines



# Executive Summary

**This report explores how UK travellers perceive and act on sustainability in air travel, to better understand evolving passenger expectations. Based on a survey of 2,000 UK adult passengers, the findings reveal what passengers really think about sustainability and how airlines can use this intel to provide more sustainable journeys, from tableware and F&B to fuel and ticket prices. <sup>1</sup>**

## Key findings:

- Sustainability matters to over half of travellers (51%), yet 68% have never actively chosen an airline based on environmental performance.
- 42% make onboard purchasing choices based on sustainability; waste reduction and plastic-free initiatives are the most valued.
- A meaningful 37% would pay more for greener options onboard, with most willing to spend 6–10% extra.
- Only 14% believe airlines are currently sustainable, though 40% think they're improving.
- Catering waste is a major issue, with 18% of complimentary food and drink going unconsumed.

Travellers care about sustainability in principle but rarely translate that into behaviour. There's optimism about airline progress but scepticism about the authenticity of it. Visible sustainability efforts – especially waste reduction and circular practices – strongly influence perception of UK travellers and airlines have a commercial opportunity to link sustainability with loyalty through tangible, transparent actions.





# Sustainability Awareness & Perceptions

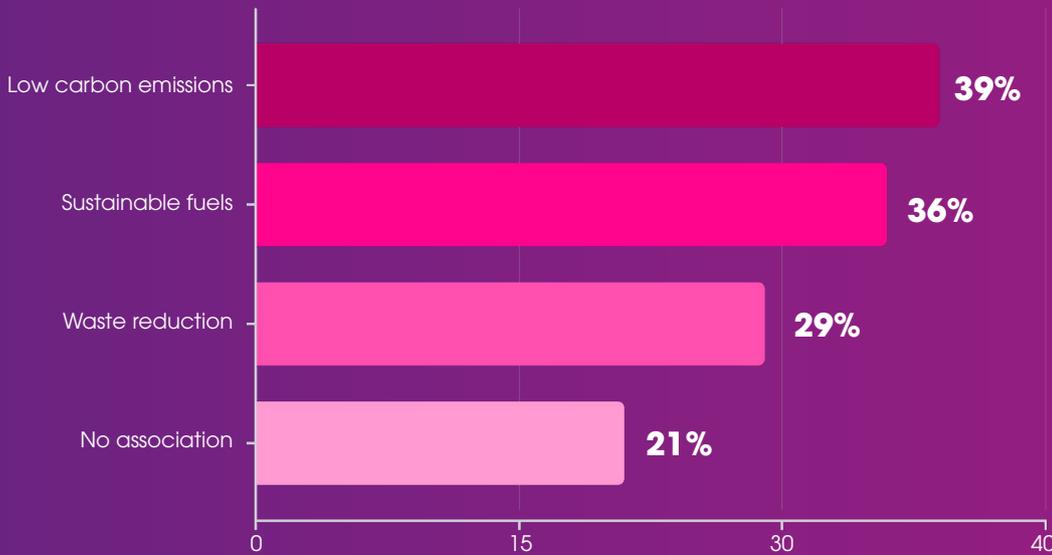
## The landscape

Sustainability awareness among travellers is high, but perceptions remain mixed. While visible sustainability efforts strongly influences perceptions of UK travellers, when asked what they most associate with 'sustainability in flying', respondents cited low carbon emissions (39%) and sustainable fuels (36%). However, waste reduction and recycling followed closely (29%), while one in five (21%) admitted they didn't associate sustainability with any current airline practice – a sign of uncertainty or even scepticism.

This is reinforced by the broader sentiment of only 14% of travellers viewing airlines as genuinely sustainable, yet nearly 40% believing the industry is improving. A further 24% are undecided, signalling communication gaps around what airlines are actually achieving.



## Perceptions of Sustainable Aviation



"Travellers want to believe that airlines are changing, but they need proof. The research data shows hope, but also hesitation from passengers. We can see a clear 'trust deficit', – progress is being made, but passengers aren't seeing it. Airlines that make sustainability visible – not just operationally but experientially – will be able to close that gap and earn long-term credibility."

### The influence of sustainability on decision-making

More than half (51%) of travellers say sustainability is important when choosing an airline. However, 68% have never actually factored environmental credentials into their booking decisions. This disconnect between stated values and real-world choices, is the core sustainability challenge in air travel today.

That said, 37% of travellers express willingness to pay more for greener flight options, with 72% of those ready to pay between 6–10% more. This creates a measurable commercial opportunity for airlines that can credibly offer visible and meaningful sustainability value.

#### Insight summary

Travellers recognise sustainability as a key issue but remain sceptical of progress. Optimism exists with passengers, but airlines must translate operational improvements into visible experiences. Creating an eco-conscious passenger experience is not just a box-ticking exercise, it must be seen and felt.

## The influence of sustainability on decision-making



**Value sustainability**  
when choosing an airline



**Never acted on it**  
when making booking decisions



**Willing to pay more**  
for greener flight options

# Onboard Behaviour and Spending

## Patterns of waste and opportunity

Onboard behaviour provides one of the clearest lenses into sustainable consumption. Three out of five passengers receive complimentary food and drink on flights, yet 28% consume none of it – highlighting a major source of avoidable waste. Global estimates suggest up to 20% of cabin waste is untouched food and beverage<sup>1</sup> - equating to millions of tonnes globally each year. Safety regulations prohibit reuse, so these items are incinerated or sent to landfill.

Reducing the amount of food loaded per flight or expanding pre-order options could dramatically cut this waste. Specifically, pre-selection systems not only reduce environmental impact, but they also have the potential to enhance the passenger experience by ensuring preferred meals, beverages, and snacks are available.

### Commentary from Matt Crane:

“Waste reduction is the ‘visible win’ passengers relate to most. It’s tangible, measurable and emotionally intuitive. By focusing on waste reduction, airlines can share infographics with passengers that show progress that passengers understand instantly. Every unserved meal avoided is less waste, less cost and lower emissions.”

## Sustainability and onboard purchases

42% of travellers say they are likely to make purchasing decisions onboard based on sustainability – whether that means choosing an eco-friendly meal, a recycled-material amenity product or plastic-free packaging. When asked which onboard sustainability initiatives most influence perception of an airline, travellers revealed:

- **33% said reducing single-use plastics**
- **31% improving recycling onboard**
- **26% introducing paperless experiences**

However, one third said that no onboard initiative would affect their perception – underscoring ongoing scepticism or ‘sustainability fatigue’.

**60%**

Receive complimentary food on flights

**28%**

Consume none of it - major source of avoidable waste

**20%**

Cabin waste is untouched - food and beverage globally

### Commentary from Kai Kosicki, WTCE Retail Technology Ambassador:

“From a retail perspective, sustainability has become a product feature. Passengers want to buy something that feels good ethically, and not just emotionally. We’re seeing growing demand for eco-certified items onboard, but equally, passengers expect airlines to lead by example. Recyclable packaging, transparent sourcing and circular retail models can all drive both trust and spend.”

### Insights summary

Sustainable consumption onboard is both a reputational and commercial opportunity. Airlines can cut costs and emissions through smarter inventory and pre-order models while reinforcing their green credentials through visible, low-waste retail.

**Kai is a Consultant for the Hayward Partnership and Founder of ExpAir, an Inflight Consulting company focusing on optimising the onboard experience at the lowest possible cost.**

Innovation and new technological processes have always been Kai’s drivers. After obtaining a master’s degree in Mechanical Engineering in Germany, Kai entered the airline world in 1991. For over 18 years he held a number of management positions within the Lufthansa Group, where he built his expertise in business improvement through technological innovation.

As a Business Development Director at LSG SkyChefs, Kai organised the first buy-on-board models in Latin America for airline customers. In the following years, he set up a Customer Experience Organisation at Sky Airline, contributing to the change of business model to LCC.

Since the creation of ExpAir in 2016, Kai has enabled the implementation of several buy-on-board models in Latin America, where he now focuses his experience.



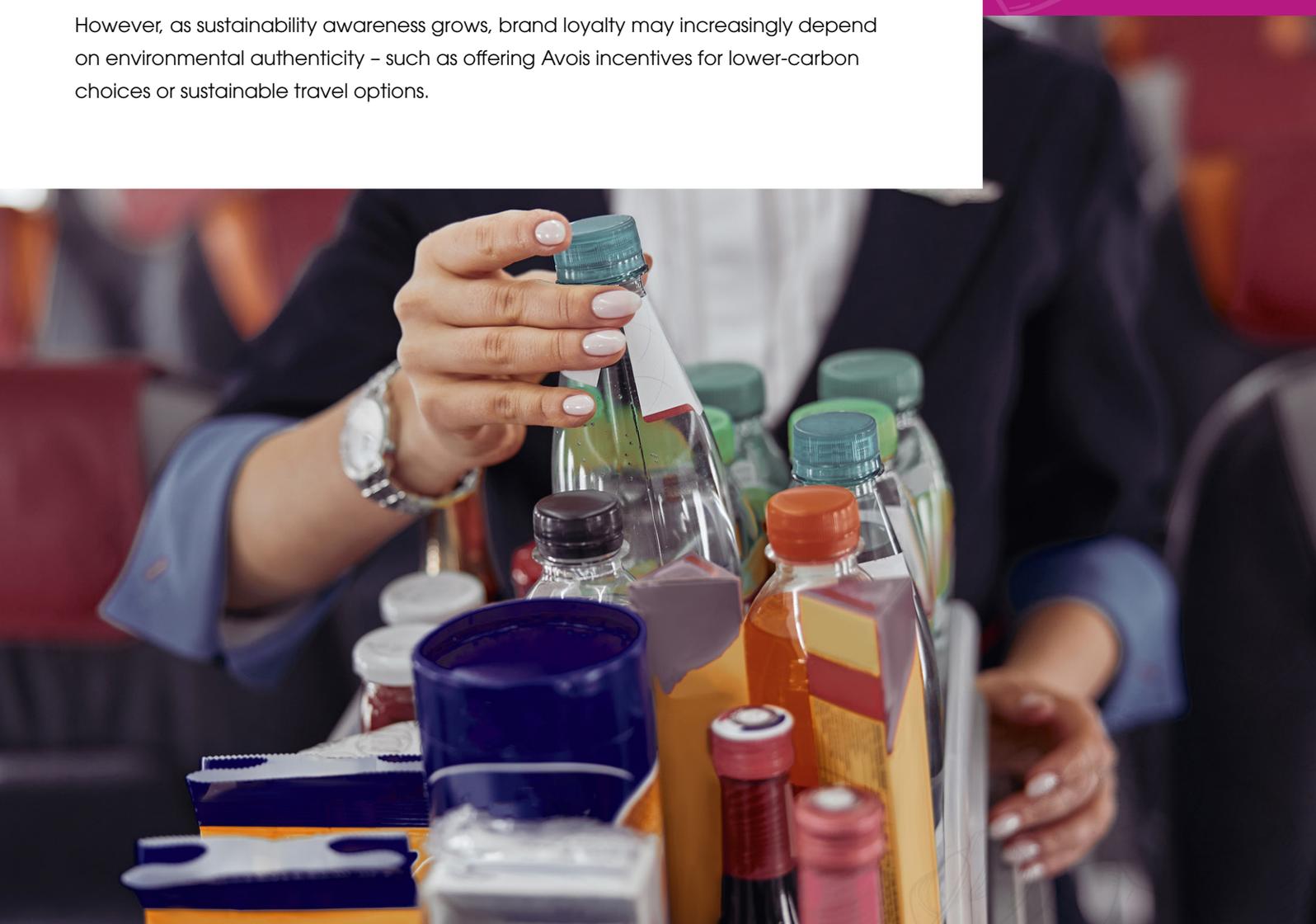
**Kai Kosicki**  
**WTCE Retail Technology Ambassador,**  
Consultant for the Hayward Partnership  
and Founder of ExpAir

# Brand Loyalty & Commercial Opportunity

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Sustainability is increasingly tied to brand trust and loyalty. British Airways' position as the most chosen airline (43%) among UK travellers demonstrates the strength of its established reputation, perceived reliability and the powerful draw of its Avios loyalty programme.

However, as sustainability awareness grows, brand loyalty may increasingly depend on environmental authenticity – such as offering Avios incentives for lower-carbon choices or sustainable travel options.



### The loyalty funnel

These findings represent both a challenge and an opportunity. If airlines can bridge perception with visible action, they stand to convert environmentally aware passengers into loyal, higher-value customers.



### Willingness to pay

The 37% of passengers willing to pay a premium represent a commercially viable segment. With 72% of those prepared to pay up to 10% more, sustainability can directly support revenue growth, especially if paired with meaningful and visible initiatives.

#### Commentary from Kai Kosicki

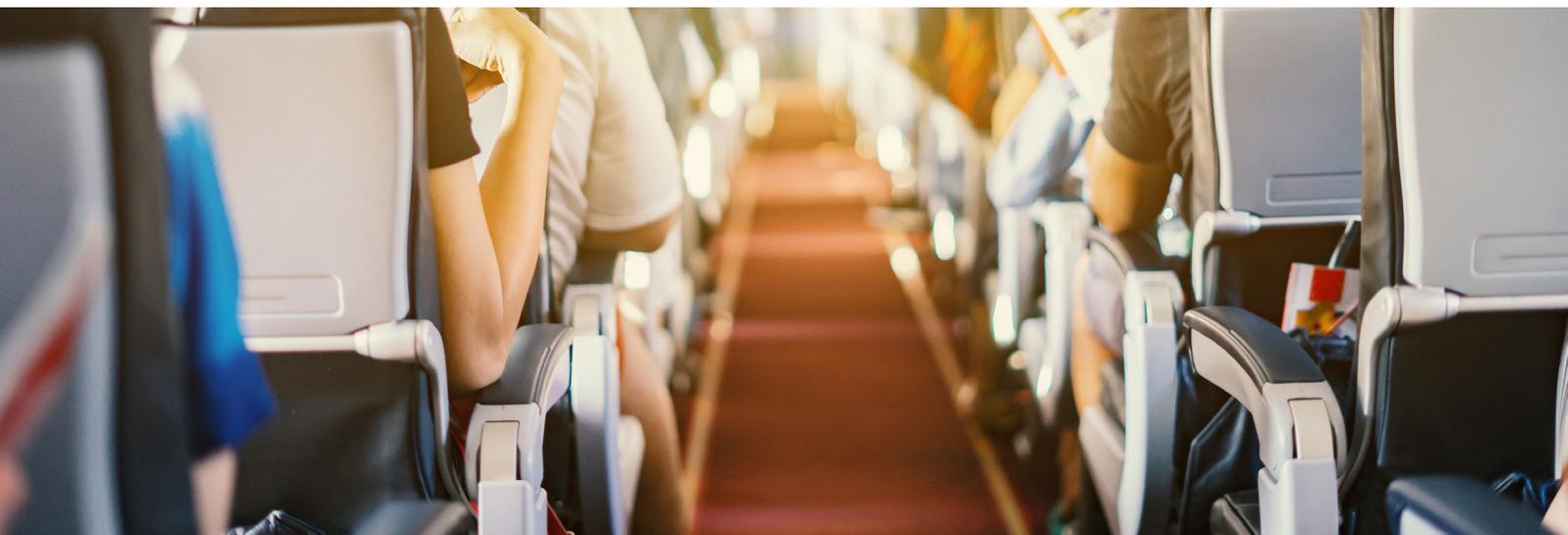
“Sustainability and loyalty now share the same language: trust. Passengers who see genuine environmental commitment are more likely to return – not just for price or comfort, but for values alignment. Airlines that weave sustainability into their loyalty propositions, from offset-linked points to eco-tier benefits, will unlock both customer retention and incremental revenue.”

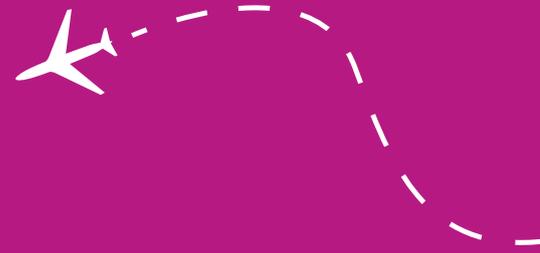
#### Commentary from Matt Crane

“Avios remains one of British Airways’ most powerful loyalty levers. For many travellers, the drive to earn and retain tier status is as influential as price or convenience. Integrating sustainability into that ecosystem and rewarding lower-carbon choices with Avios, for example, could transform responsible travel from a moral preference into a measurable loyalty incentive.”

### Insights summary

The data points to a compelling business case, that sustainability isn’t a cost – it’s a growth strategy. Airlines that invest in visible, credible sustainability initiatives will not only meet traveller expectations but build stronger emotional loyalty, which can lead to repeat bookings and long-term profitability.





# Final Thoughts

Across the survey, a consistent pattern emerges – travellers care deeply about sustainability, but behaviour lags behind belief.

This gap between intention and action is the defining challenge of sustainable aviation. Messaging alone won't close it. Only visible, credible and participatory sustainability will. Travellers must see and feel progress through initiatives that touch their journey - including reduced waste, recyclable packaging, paperless boarding, or meaningful offset options.

## Commentary from Matt Crane

"We often talk about sustainability as something we 'do behind the scenes', but passengers can't see improved fuel burn or fleet modernisation. They see what's on their tray table, in their seat pocket or in their digital app. Airlines need to make sustainability personal. When passengers feel part of the solution, and not just witnesses to it, sustainability becomes real."

**51%** say it matters

**37%** are willing to pay more for it

**68%** have never acted on it

Waste reduction stands out as the most emotionally significant theme. It's visible, measurable and connects both corporate efficiency and personal responsibility. Pre-order systems or opt-in catering exemplify how operational efficiency can deliver both sustainability and improved passenger experience.



# Key Takeaways & Recommendations



## 1

### Make sustainability visible

Focus on tangible, passenger-facing changes such as reducing single-use plastics, improving waste segregation and promoting paperless experiences. Visibility can drive trust. Or, airlines can take the consumer on the journey with them by calling for collaborative action, such as separating food waste and non-food waste on tray tables.

## 2

### Bridge the intention-action gap

Offer clear, easy ways for passengers to act sustainably, whether that's pre-order meals, opt-in amenities or contribute to verified offset projects. Behavioural friction is the biggest barrier.

## 3

### Monetise sustainability responsibly

With 37% willing to pay more, premium green fares or loyalty-linked sustainability benefits can create new revenue streams without compromising trust.

## 4

### Prioritise waste reduction as a core metric

Waste is both a sustainability and cost challenge. Smart loading, digital menus and recycling incentives can deliver immediate impact.

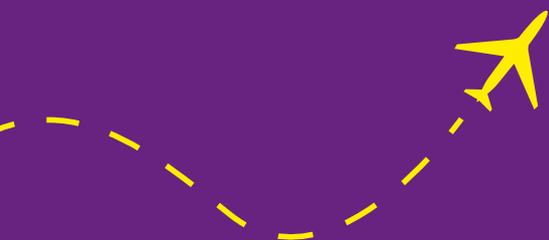
## 5

### Communicate with authenticity and transparency

Nearly a quarter of travellers are unsure how sustainable airlines really are. Regular reporting, measurable targets and third-party verification will build credibility.

### Commentary from Matt Crane

"This data tells us travellers want to care and are willing to play their part and get involved. They're looking for cues that the travel industry shares their values. If we can align visibility, authenticity, action and passenger participation – we can make sustainability not just a moral choice but a smarter business strategy."



# Conclusion

Sustainability is reshaping the way people think about travel, but it hasn't yet reshaped how they fly. The findings in this report highlight both the urgency and opportunity for airlines to turn sustainability into a differentiator.

Travellers associate sustainability with waste reduction, cleaner fuels and lower emissions, yet they're looking for visible proof. Airlines that bridge this 'trust gap' will not only reduce environmental impact but also strengthen their commercial position through loyalty and brand differentiation.

## **Final note from Matt Crane:**

"A sustainable airline isn't just a cleaner airline; it's a smarter one. The future belongs to carriers that make sustainability part of the passenger experience, not just part of their corporate story. When sustainability feels real to travellers, everyone wins – the planet, the passenger and the airline."