



## FINDINGS AND METHODOLOGY

### Full Annotated Questionnaire

NOTE: All results show percentages among all respondents, unless otherwise labeled.

Q1: What do you think is the biggest challenge facing the aviation industry currently?

*Coded open ended responses*

	<b>Total (=325)</b>
Rising cost/ Inflation ( Healthcare, Labor, procurement, Energy, Equipments, oil, gas..)	20%
Supply issues ( Raw materials, distribution, equipments, energy, delays..)	8%
Business expansion/ Sustainable growth	7%
Lack of staff/ Manpower/talented staff	6%
Need better technology/ advanced technology	5%
Decarbonizing/carbon reduction	4%
Budget/Funding	4%
Covid/Corona virus/Covid 19 restrictions/impact of Covid	4%
Political issues/ Instability/ Geopolitical issues	3%
Proper infrastructure	3%
Climate change ( Global warming)	3%
Environmental Issues (Pollution, Environment protection, Govt compliance)	3%
Energy Shortage ( Fuel, Coal, electricity)	3%
Other regulatory challenge mentions	2%
Digital/ Technical innovation/ Lack of Innovations	2%
Market competitions/ Too much competition ( Foreign, local..)	2%
Need to increase renewable energy/Development of new energy (Wind, electric,)	2%
Sustainable energy usage	2%
Staff recruitment / Employment	2%
Timely delivery/Ontime delivery	2%
Adaption of new technology/ Mastering the technology	1%
Adaption of artificial intelligence/ AI Solution	1%
Proper planning/ Policies / Lack of clear goals	1%



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Other service challenges mentions	1%
Other miscellaneous mentions	1%
Other price and investment challenge mentions	1%
Rapid/too fast technology development	1%
Lack of IT resources / management	1%
Communication/lack of communication	1%
Safety/ Security ( General security, unsp..)	1%
More production/ Increase capacity	1%
Staff training/lack of training	1%
Time management	1%
Availability of products/ equipments/ spares	1%
Lack of resource (Coal, Energy, equipments)	1%
Low cost	1%
Net Zero	1%
Delays in contracts	1%
Issues with salary / pay structure/ wages	1%
Need better R&D system	1%
Less experience / knowledge of AI	1%
Slow technology development	1%
Other technology challenge mentions	1%
Greenhouse gas emission	1%
Decreasing market demand (less customers)	1%
Industrial development ( Aviation, production)	1%
Other energy challenge mentions	1%
Other staffing challenge mentions	1%
Other management challenge mentions	1%
Lack of cooperation	1%
Lack of transport service	1%
Future development/ Better development	1%
Globalization issues	1%
Unemployment/ less jobs	1%
Russia-Ukraine war/ Global wars	1%

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Q2: Which of the following would you say is the biggest challenge facing the aviation industry currently?

	<b>Total (=325)</b>
Meeting sustainability goals	30%
Ongoing supply chain challenges	19%
Labor issues	11%
Infrastructure challenges	10%
Geopolitical tensions	7%
Regulatory oversight/approval	6%
On time delivery	5%
Meeting consumer demand	5%
COVID	3%
Other (please specify)	2%

Q3a: Do you believe the sustainability strategies being implemented in the aviation industry are:

	<b>Total (=325)</b>
On the right track	83%
On the wrong track	17%

Q3b. Do you feel the sustainability strategies being implemented in the aviation industry are happening at [ROTATE: too slow, too fast] or the right pace?

	<b>Total (=325)</b>
Too slow	51%
Too fast	8%
At the right pace	41%

Q4: How much do you [ROTATE: agree or disagree] with the following statement

- a) The focus on sustainability has fundamentally changed the way the aviation industry operates

	<b>Total (=325)</b>
Strongly disagree	1%
Somewhat disagree	9%
Neither agree nor disagree	13%
Somewhat agree	42%
Strongly agree	34%

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Q4: How much do you [ROTATE: agree or disagree] with the following statement (*Continued*)

b) Companies in the aviation industry have a long way to go to reach their sustainability goals

	<b>Total (=325)</b>
Strongly disagree	2%
Somewhat disagree	6%
Neither agree nor disagree	13%
Somewhat agree	43%
Strongly agree	36%

c) The aviation industry is united in its focus on implementing sustainability solutions - [pipe: hQ4b]

	<b>Total (=325)</b>
Strongly disagree	3%
Somewhat disagree	14%
Neither agree nor disagree	17%
Somewhat agree	39%
Strongly agree	28%

Q5: Does your company currently have a sustainability strategy?

	<b>Total (=325)</b>
Yes	88%
No	8%
Unsure	4%

**[ASKED IF Q5 = YES]** Q6: Do you anticipate that rising inflation and the risk of recession will change your sustainability investment in the next 3 years?

	<b>Total (=287)</b>
We will pull back sustainability investments given inflation and potential recession	22%
We will ramp up sustainability investments despite rising inflation and potential recession	46%
Any sustainability investment changes will not be due to rising inflation and potential recession	28%
Don't know	3%

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[ASK IF Q5 = YES] Q7r - How, if at all, has your company's sustainability strategy impacted the way your company...

a) Operates

	<b>Total (=287)</b>
Major impact	33%
Moderate impact	41%
Minor impact	21%
No impact	6%
Major impact, or Moderate impact (summary)	74%

b) Is investing

	<b>Total (=287)</b>
Major impact	32%
Moderate impact	41%
Minor impact	23%
No impact	4%
Major impact, or Moderate impact (summary)	73%

c) Is hiring

	<b>Total (=287)</b>
Major impact	24%
Moderate impact	37%
Minor impact	26%
No impact	13%
Major impact, or Moderate impact (summary)	62%

Q8 - How conducive are each of the following countries to supporting the aviation industry's decarbonization goals?

*Rated 9-10 on 10 point scale summary*

	<b>Total (=325)</b>
U.S.	46%
China	31%
India	12%
France	34%
UK	35%
UAE	30%
KSA	22%
Singapore	28%

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Q9: From where are you seeing the most pressure to develop more sustainable strategies?

	<b>Total (=325)</b>
Employees	3%
Government	29%
Investors	17%
NGOs	6%
Partners	8%
Suppliers	12%
Customers	10%
Consumers	7%
Media	8%
Other (please specify)	0%

Q10: Do you believe the aviation industry will meet its 2050 net zero goal?

	<b>Total (=325)</b>
Yes	46%
No	32%
Unsure	22%

Q11: What do you see as the biggest hurdle to meeting the aviation industry's 2050 net zero goal?

*Coded open ended responses*

	<b>Total (=325)</b>
	Overall
Rising cost/ Inflation ( Healthcare, Labor, procurement, Energy, Equipments, oil, gas..)	15%
Budget/Funding	11%
Supply issues ( Raw materials, distribution, equipments, energy, delays..)	7%
Energy Shortage ( Fuel, Coal, electricity)	6%
Political issues/ Instability/ Geopolitical issues	5%
Need better technology/ advanced technology	5%
Net Zero	5%
Proper planning/ Policies / Lack of clear goals	5%
Lack of cooperation	5%
Decarbonizing/carbon reduction	3%
Industrial development ( Aviation, production)	3%
Need to increase renewable energy/Development of new energy (Wind, electric,)	3%
Time management	3%

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Other price and investment challenge mentions	2%
Slow technology development	2%
Market economy system	2%
Lack of resource (Coal, Energy, equipments)	2%
Adaption of new technology/ Mastering the technology	2%
Lack of technical support	2%
Lack of staff/ Manpower/talented staff	2%
Change management	2%
Other management challenge mentions	2%
Other regulatory challenge mentions	1%
Digital/ Technical innovation/ Lack of Innovations	1%
Technology/ Intellectual security	1%
Sustainable energy usage	1%
Senior management/ Leadership	1%
Proper infrastructure	1%
Business expansion/ Sustainable growth	1%
Other service challenges mentions	1%
Lack of options / opportunities	1%
Other miscellaneous mentions	1%
Delays in contracts	1%
Issues with salary / pay structure/ wages	1%
Cost of living/ living crisis	1%
Bad debts/ NPA	1%
Need better R&D system	1%
Adaption of artificial intelligence/ AI Solution	1%
Lack of IT resources / management	1%
Climate change ( Global warming)	1%
Greenhouse gas emission	1%
Other environment challenge mentions	1%
Market competitions/ Too much competition ( Foreign, local..)	1%
Lack of ventures with foreign companies	1%
Fulfillment of energy demand / Increased demand	1%
More production/ Increase capacity	1%
Energy Transition	1%
Other energy challenge mentions	1%
Staff training/lack of training	1%
Collaborate with new business partners / new business opportunity	1%
Availability of products/ equipments/ spares	1%

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Insurance policies ( companies, regularities)	1%
Future development/ Better development	1%
Lots of challenges (unsp)	1%
Russia-Ukraine war/ Global wars	1%
Low cost	1%
Timely delivery/Ontime delivery	1%
Don't know / Not sure	1%

Q12: When, if ever, do you think would be a realistic timeline to meet the aviation industry's net zero goal?

	<b>Total (=325)</b>
Mean	2,055
Never	3%
Not sure	13%

Q13: What technology do you think is likely to play the biggest role/be most effective in helping the aviation industry meet its 2050 net zero goal?

	<b>Total (=325)</b>
Increased use of Sustainable Aviation Fuels (SAF)	27%
Hydrogen-blend fuel	23%
Hybrid-electric engine development	21%
More efficient engine designs, such as open fan technology	13%
Digital solutions	7%
Infrastructure improvements	8%
Other disruptive technology (Please specify)	2%

Q14r - What role do you believe government should play in helping reach the 2050 goal? Please rank from most important (1) to least important (6) role for government to play.

a) Increased investment in Sustainable Aviation Fuels (SAF)

	<b>Total (=325)</b>
Most important - 1	32%
2	18%
3	14%
4	12%
5	13%
Least important - 6	10%
Most important - 1, or 2 ( <i>summary</i> )	51%



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Q14r - What role do you believe government should play in helping reach the 2050 goal? Please rank from most important (1) to least important (6) role for government to play. (Continued)

b) Continued public-private partnerships to develop new technology

	<b>Total (=325)</b>
Most important - 1	14%
2	20%
3	20%
4	20%
5	13%
Least important - 6	14%
Most important - 1, or 2 (summary)	34%

c) Increased research and development (R&D) funding

	<b>Total (=325)</b>
Most important - 1	18%
2	22%
3	22%
4	16%
5	11%
Least important - 6	11%
Most important - 1, or 2 (summary)	40%

d) Policy certainty

	<b>Total (=325)</b>
Most important - 1	13%
2	9%
3	13%
4	14%
5	27%
Least important - 6	24%
Most important - 1, or 2 (summary)	22%

e) More infrastructure investment

	<b>Total (=325)</b>
Most important - 1	15%
2	18%
3	19%
4	19%
5	14%
Least important - 6	14%
Most important - 1, or 2 (summary)	33%

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Q14r - What role do you believe government should play in helping reach the 2050 goal? Please rank from most important (1) to least important (6) role for government to play. (Continued)

f) Improved regulatory oversight

	<b>Total (=325)</b>
Most important - 1	8%
2	13%
3	13%
4	19%
5	22%
Least important - 6	26%
Most important - 1, or 2 (summary)	21%

Q15r- Please read through the following statements and indicate which aligns more with your opinion:

	<b>Total (=325)</b>
1 - The government's role in achieving net zero by 2050 would be most effective by focusing on mandates and regulation	8%
2	10%
3	21%
4	31%
5 - The government's role in achieving net zero by 2050 would be most effective by focusing on incentives and policy support	30%
1 - The government's role in achieving net zero by 2050 would be most effective by focusing on mandates and regulation, or 2 (summary)	19%
4, or 5 - The government's role in achieving net zero by 2050 would be most effective by focusing on incentives and policy support (summary)	61%

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Q15r- Please read through the following statements and indicate which aligns more with your opinion:  
(Continued)

	<b>Total (=325)</b>
1 - The aviation industry's public comments/position does not align with the reality of meeting its 2050 net zero goal	11%
2	12%
3	25%
4	28%
5 - The aviation industry's public comments/position aligns with the reality of meeting its 2050 net zero goal	24%
1 - The aviation industry's public comments/position does not align with the reality of meeting its 2050 net zero goal, or 2 (summary)	24%
4, or 5 - The aviation industry's public comments/position aligns with the reality of meeting its 2050 net zero goal (summary)	52%

Q16r- Please read through the following statements and indicate which aligns more with your opinion:

	<b>Total (=325)</b>
1 - Solving sustainability challenges in the aviation industry must focus on aircraft and fuel improvements	18%
2	23%
3	15%
4	23%
5 - Infrastructure improvements are a critical part of solving sustainability challenges in the aviation industry	21%
1 - Solving sustainability challenges in the aviation industry must focus on aircraft and fuel improvements, or 2 (summary)	41%
4, or 5 - Infrastructure improvements are a critical part of solving sustainability challenges in the aviation industry (summary)	44%

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Q16r- Please read through the following statements and indicate which aligns more with your opinion:  
(Continued)

	<b>Total (=325)</b>
1 - The industry can't rely on consumers' willingness to pay more for a more environmentally sustainable flight	24%
2	18%
3	17%
4	26%
5 - Consumers are willing to pay more for a more environmentally sustainable flight	16%
1 - The industry can't rely on consumers' willingness to pay more for a more environmentally sustainable flight , or 2 (summary)	41%
4, or 5 - Consumers are willing to pay more for a more environmentally sustainable flight (summary)	42%



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### About the Study

These are the findings of a GE Aerospace/Ipsos poll conducted between May 2-11, 2023. For this survey, a sample of 325 aviation decision makers ages 26+ from the U.S., U.K., China, India, the UAE, and France were interviewed in English, Chinese, Arabic, or French. Respondents in the U.S., U.K., China, and France were interviewed online, while those in the UAE and India interviewed by telephone. To qualify, respondents needed to work full-time at or own a company with 100+ employees in the aviation/aerospace, transport and logistics, or travel sector, have a role as a middle manager or more senior, and have all, part, or some of the decision-making responsibility or input in the aviation/aerospace, transport, or logistics areas. For those in the U.S., the company needed to have an annual revenue of \$5 million or more. For those in the U.K., the company needed to have an annual revenue of £5 million or more. For those in China, the company needed to have an annual revenue of 4.5 million yuan or more. For those in India, the company needed to have an annual revenue of ₹30 crore or more. For those in the UAE, the company needed to have an annual revenue of 37.5 million dirham or more. For those in France, the company needed to have an annual revenue of €5 million or more. The sample includes 57 respondents from the U.S., 56 respondents from the U.K., 50 respondents from China, 55 respondents from India, 55 respondents from the UAE, and 52 respondents from France.

The online sample was randomly drawn from opt-in partner online panel sources. The phone sample was drawn from partner proprietary databases as well as online third-party sources. Overall, the study's sample does not rely on a population frame in the traditional sense. No post-hoc weights were applied to the data and the findings reflect the opinion of these respondents.

Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 6.7 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=325, DEFF=1.5, adjusted Confidence Interval=+/-8.2 percentage points).

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### About Ipsos

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Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.

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