



Are we energised?

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ITM Travel Conference

Energising 2023

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I hope you're sitting comfortably...

What proportion of Britons
think it's acceptable to take
off your shoes and socks
during a flight?

1. **5%**
2. **14%**
3. **27%**

Source: <https://yougov.co.uk/topics/society/survey-results/daily/2023/01/17/46a1d/3>



27%

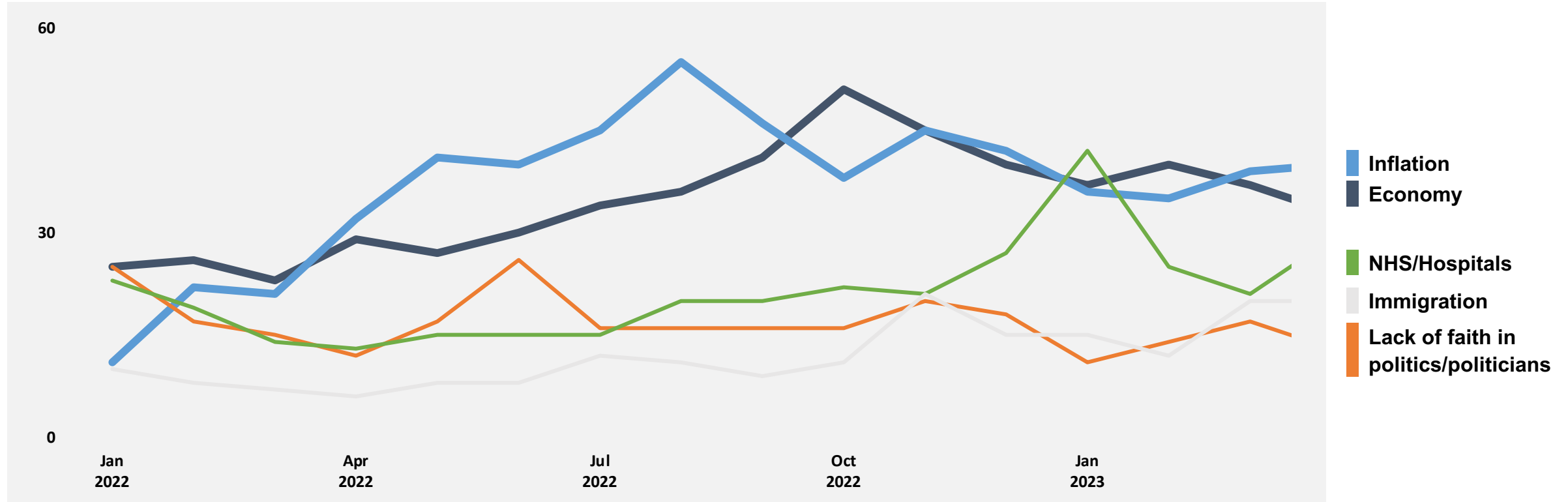
Where are the
British public
today?



Two concerns for the past year – inflation and the economy

- What do you see as the most/other important issues facing Britain today?

Top five mentions %

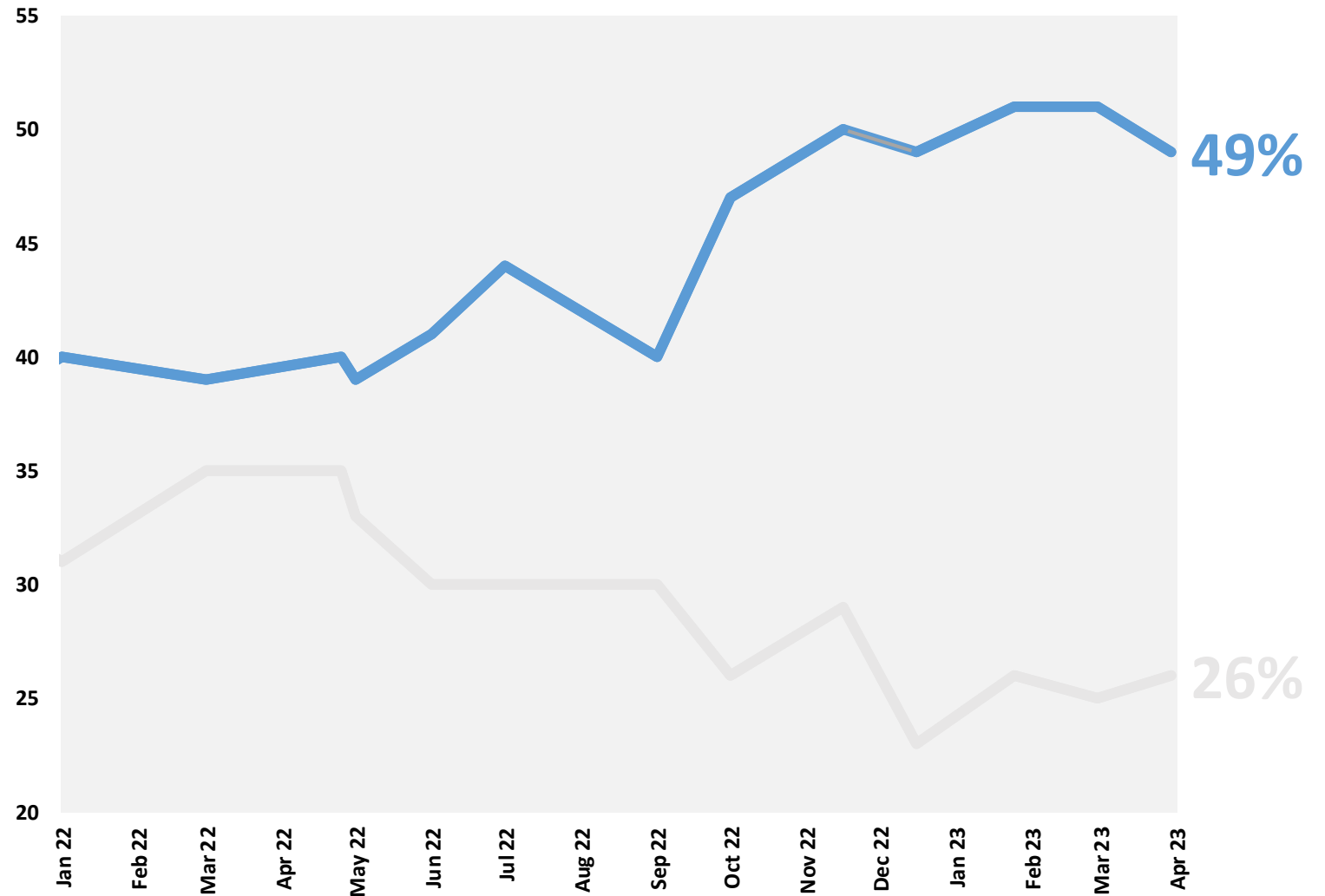


Base: representative sample of c. 1,000 British adults age 18+ each month, interviewed face-to-face in home
N.B. April 2020 data onwards is collected by telephone; previous months are face-to-face

Source: Ipsos Issues Index

government has
experienced
extreme
(self-inflicted)
turbulence

- How would you vote if there were an election tomorrow?

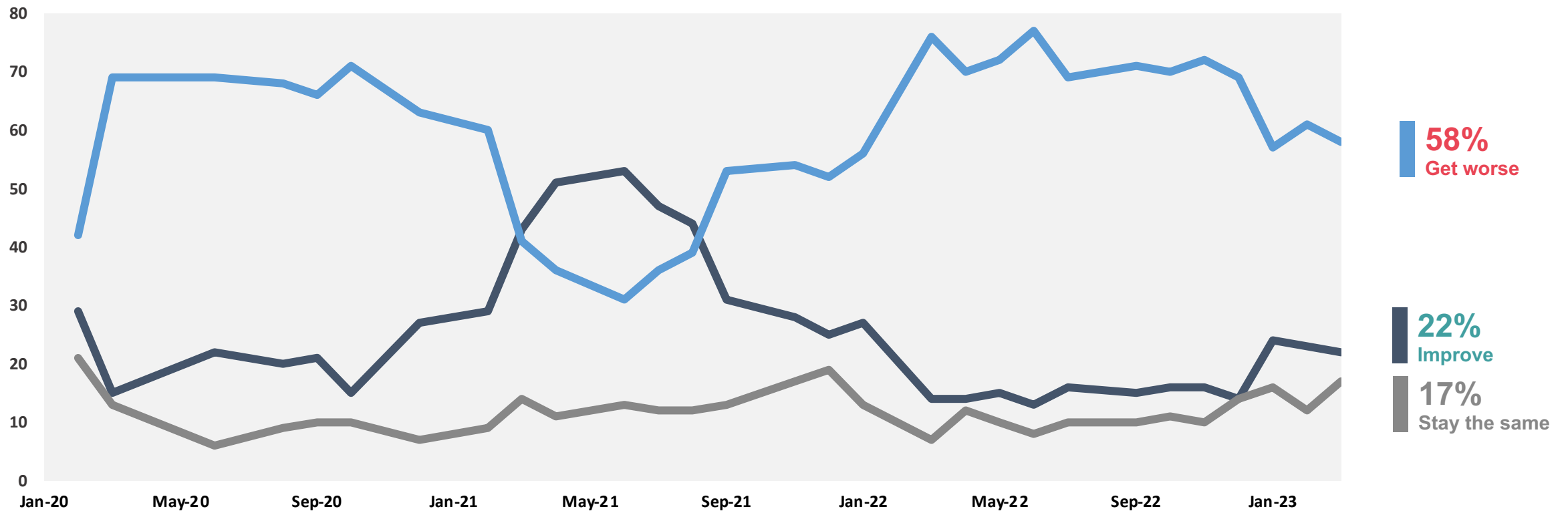


Base: c. :800 British adults 18; Prior to July 2015 the turnout filter is "All certain to vote"; From July 2015 turnout filter is "all 9/10 certain to vote and always/usually/it depends vote in General Elections. Note small change in methodology in approach to prompting Brexit Party in July 2019

Source: Ipsos Political Monitor

Public economic confidence has re-entered a nosedive But signs we are levelling off...

Do you think that the general economic condition of the country will improve, stay the same or get worse over the next 12 months?



Source: Ipsos Political Monitor
Base: 1,004 British adults 18+, 22 – 29 March 2023

But plenty of energy in travel!

50%

Of the UK public have travel plans within the next three months

26%

Of employed UK adults have business travel plans within the next three months

Source: Ipsos Essentials

Base: 1003 adults aged 16-74 in the United Kingdom, interviewed online March 6-10 2023

Work travel: 644 employed adults aged 16-74 in the United Kingdom, interviewed online March 6-10 2023



Where does the
travel industry
stand?

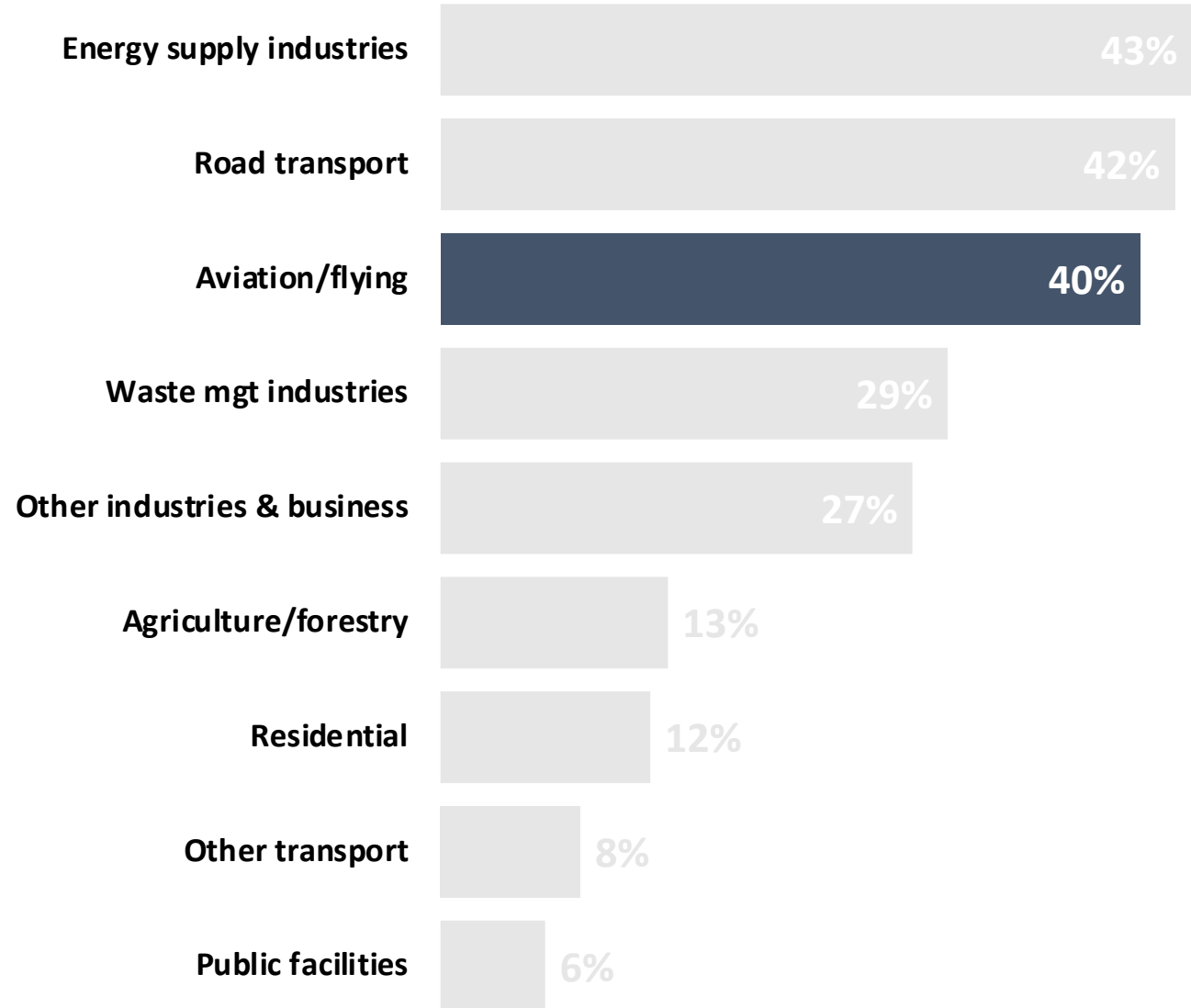


Sustainability

The public see aviation as having a big impact on global warming

Carbon emissions (also called 'greenhouse gases') are widely believed to contribute to global warming and are emitted by various economic and consumer activities.

Which of the following do you think are the main sources of carbon emissions in the UK?



And the sector is seen as making less effort than others to clean up its act

Based on what you may know or have heard, to what extent, if at all, do you think each of the following industries in the UK are making efforts to reduce their carbon emissions?

• 43%

- Energy supply industries such as power plants

• 38%

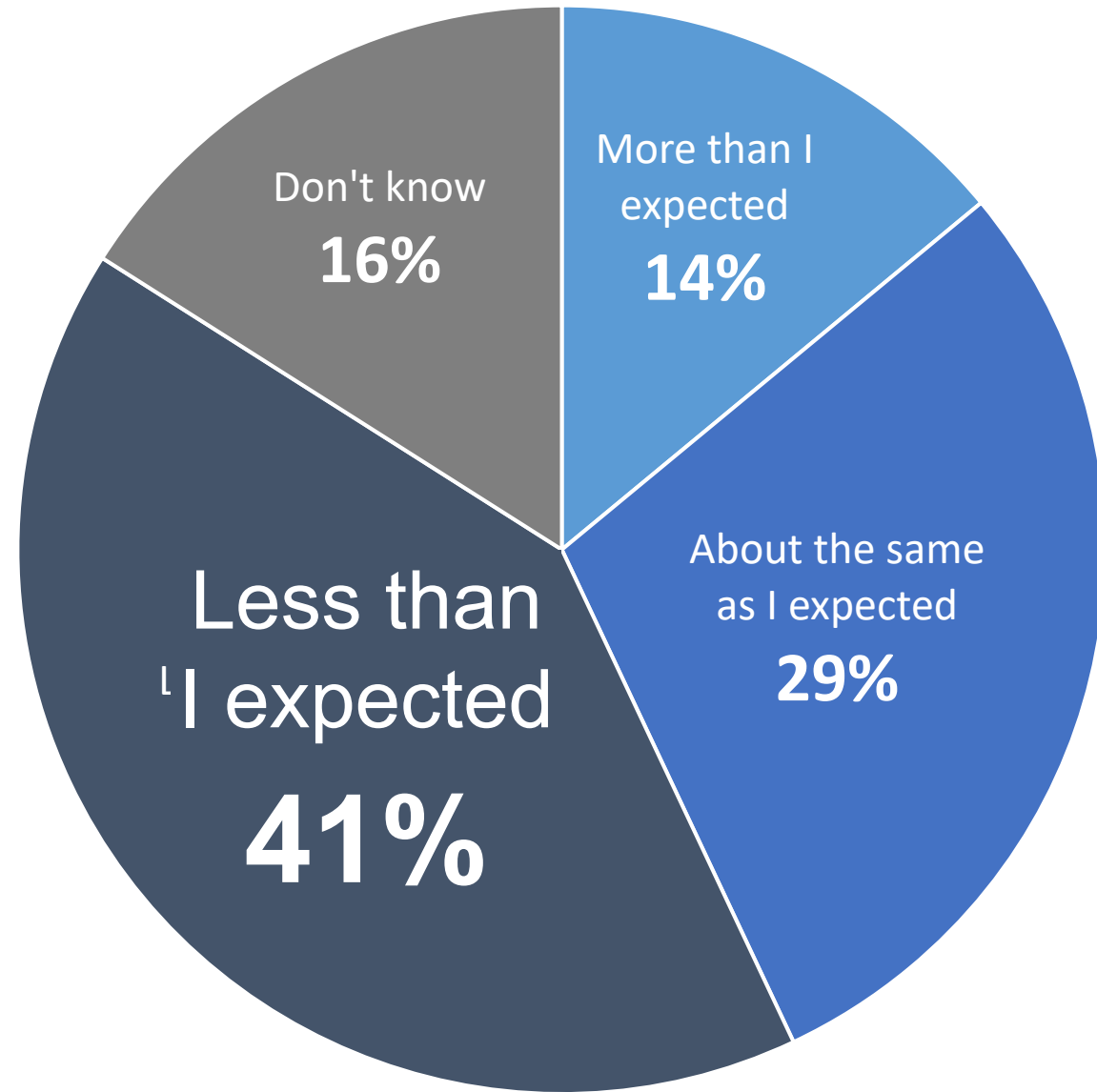
- Road, rail and shipping transport

• 30%

- Aviation and flying

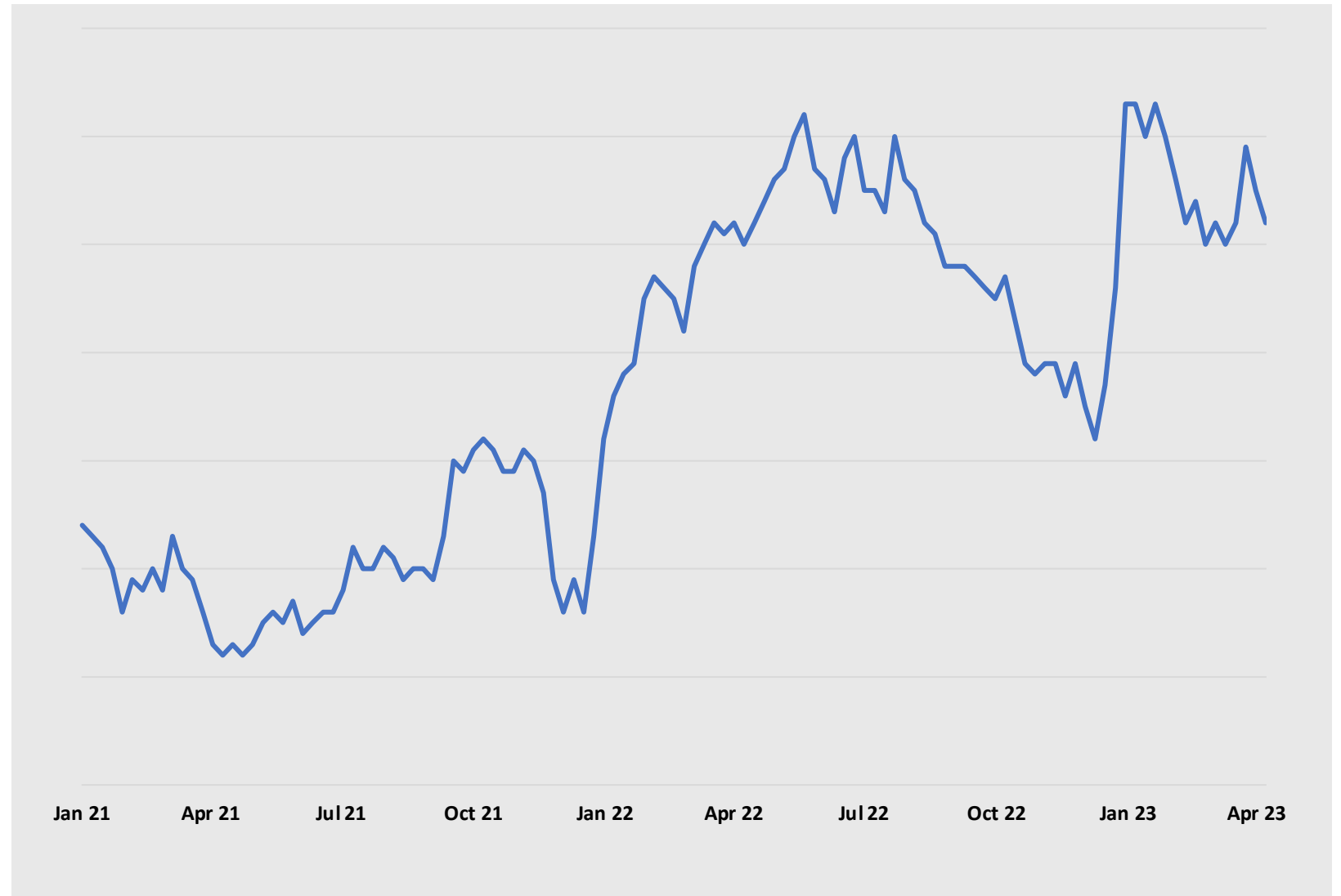
...the perils of
perception
work against
the industry

- Aviation/flying accounts for 8% of carbon emissions in the UK.
- **Is this more or less than you expected, or about the same?**



But public behaviours belie their green leanings...

- **Google Trends**
- UK search intensity for “Cheap flights”



- Wellbeing
- Workers are still feeling the strain

38% agree “in the past six months I’ve felt under constant strain at work”

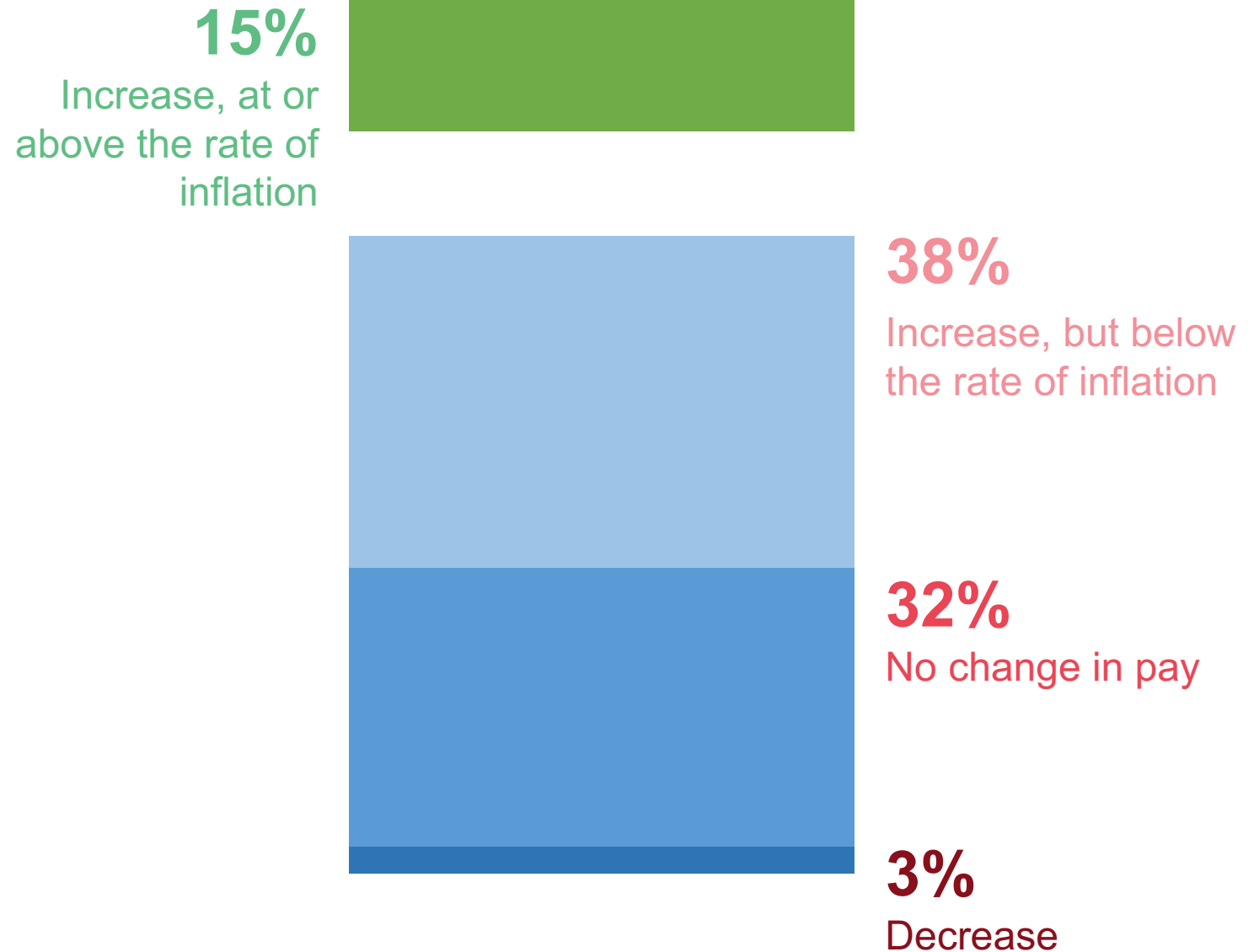
47% among 16-24s

Base: 1,923 adults aged 16-75 in the UK, conducted between 7th January and 10th January 2022



Expectations for pay aren't enough to offset inflation

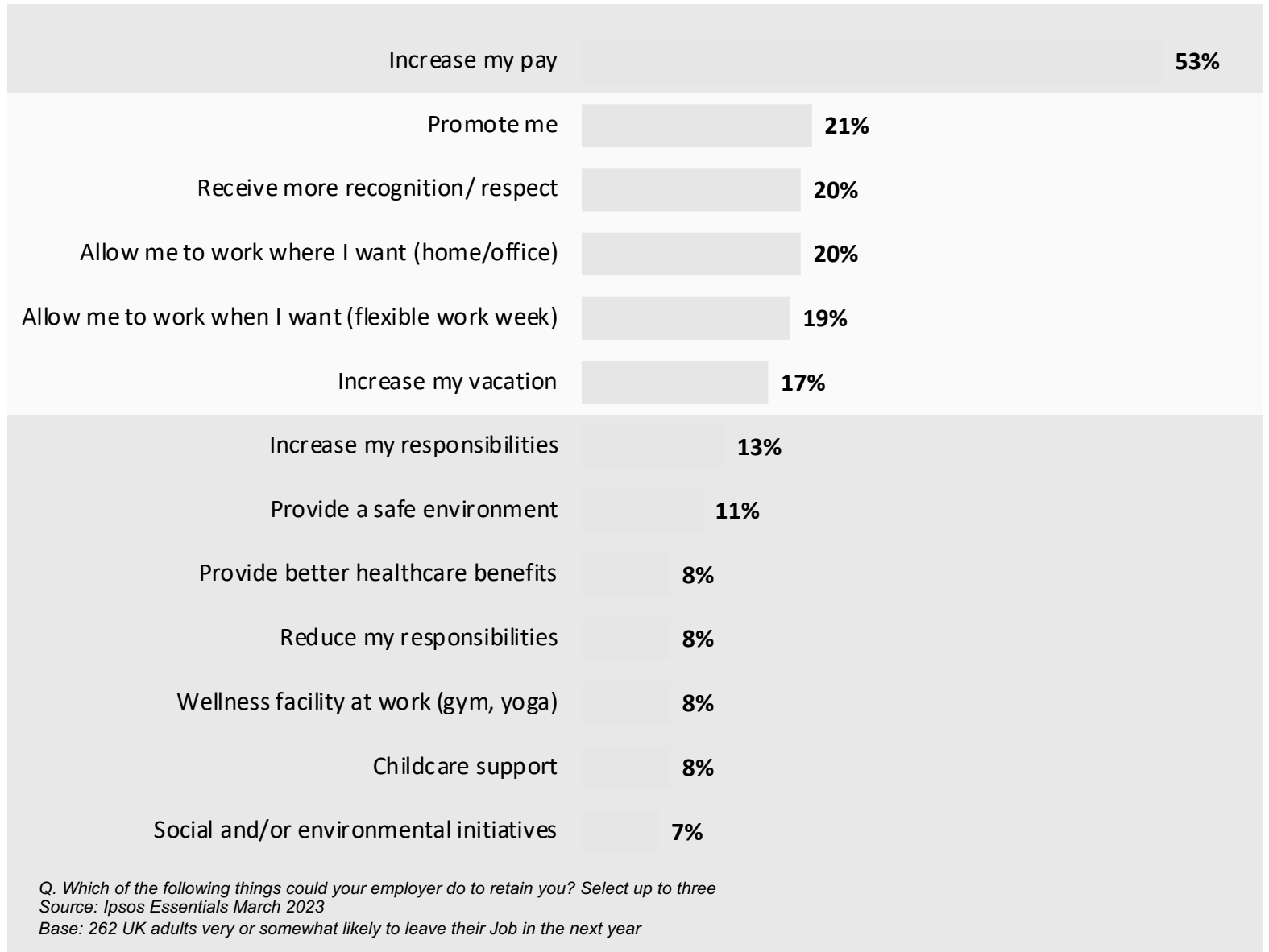
- How do you expect your salary or hourly wage to change in the next year?



What can employers do outside pay?

Culture and wellbeing is important

- Actions employers can take to retain UK employees who are likely to leave their job in the next 12 months



Breaking down
barriers is important
too

**Employee
(un)willingness to
discuss issues**
is seen as the biggest
obstacle to providing
health and mental
wellbeing support at
work

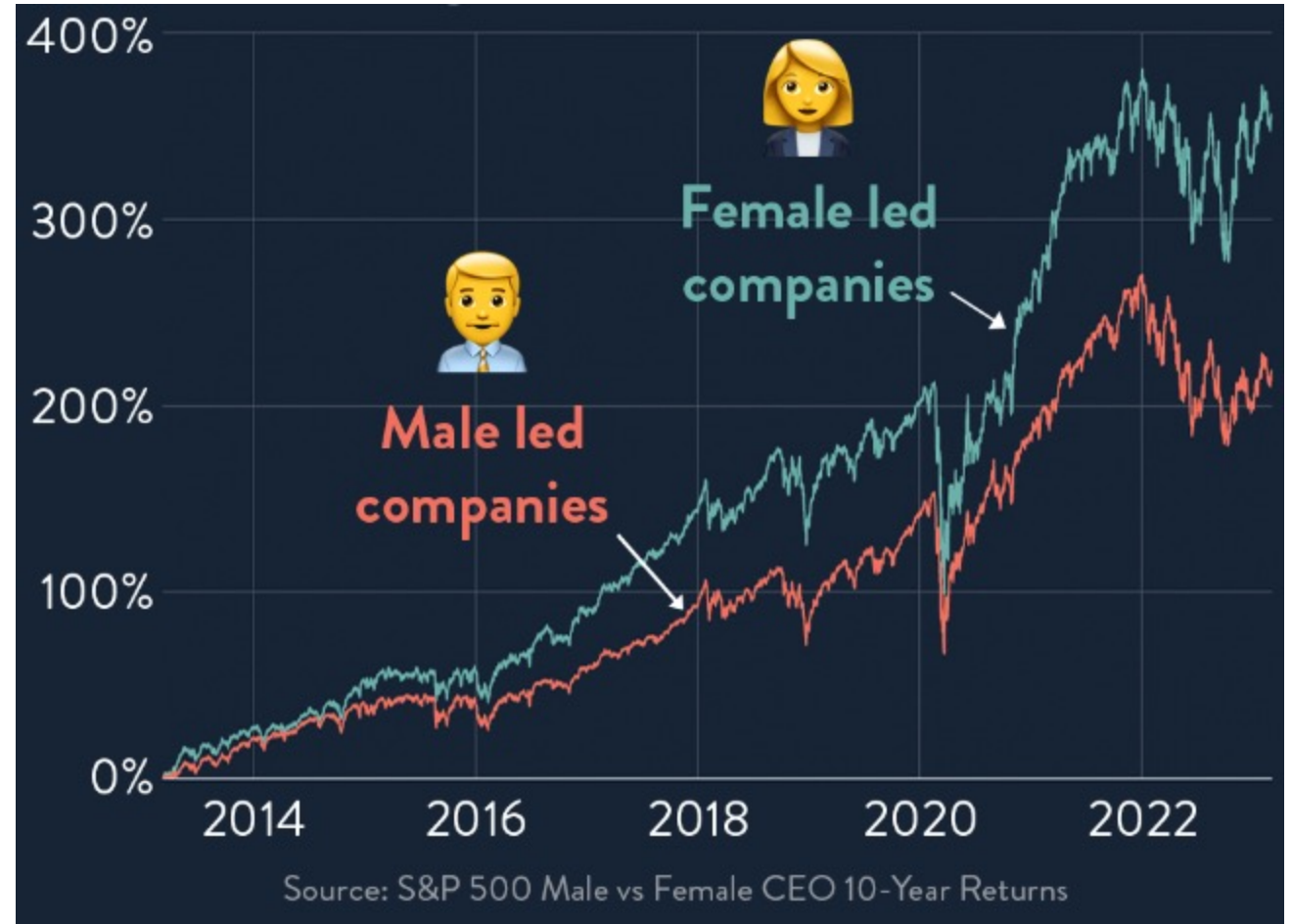
Source: Ipsos International SOS Risk Outlook 2023
Base: 1218 Risk professionals across 108 countries, 2-28 October 2022



As is flying through the glass ceiling...

- **S&P 500 companies**
- The 6% led by women have outperformed the 94% led by men over the past 10 years...

<https://www.personalfinanceclub.com/are-female-ceos-better-than-male-ceos/#:~:text=Over%20the%20past%2010%20years,%25%20from%20male%2Dled%20companies>



- Other kinds of **diversity** are important too – there is more work to do.

Currently **90%** of US pilots are white and male

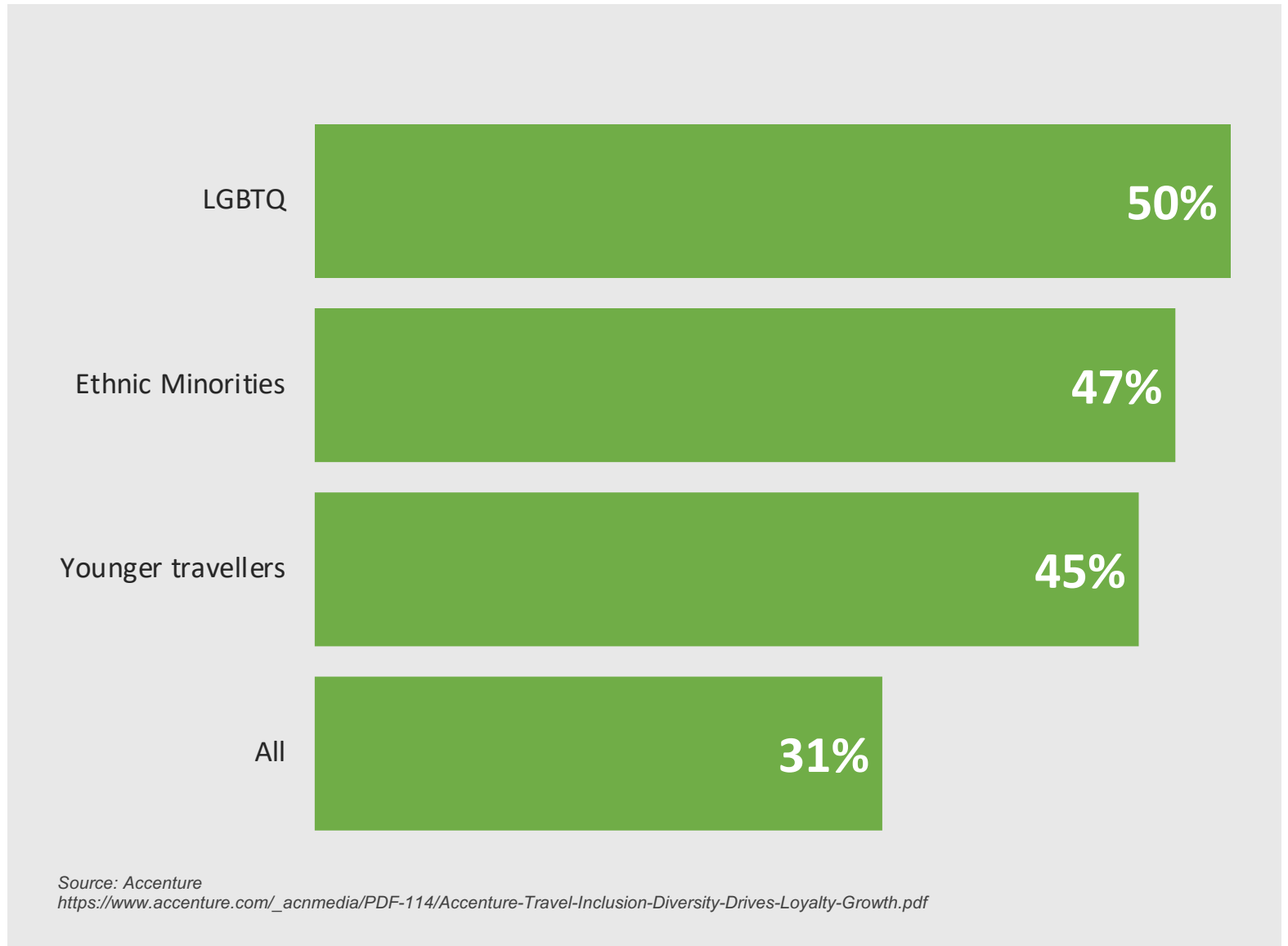
Source: <https://www.cntraveler.com/story/how-are-travel-industry-leaders-actually-working-toward-a-more-inclusive-future>



Diversity and inclusion are important, especially to younger travellers

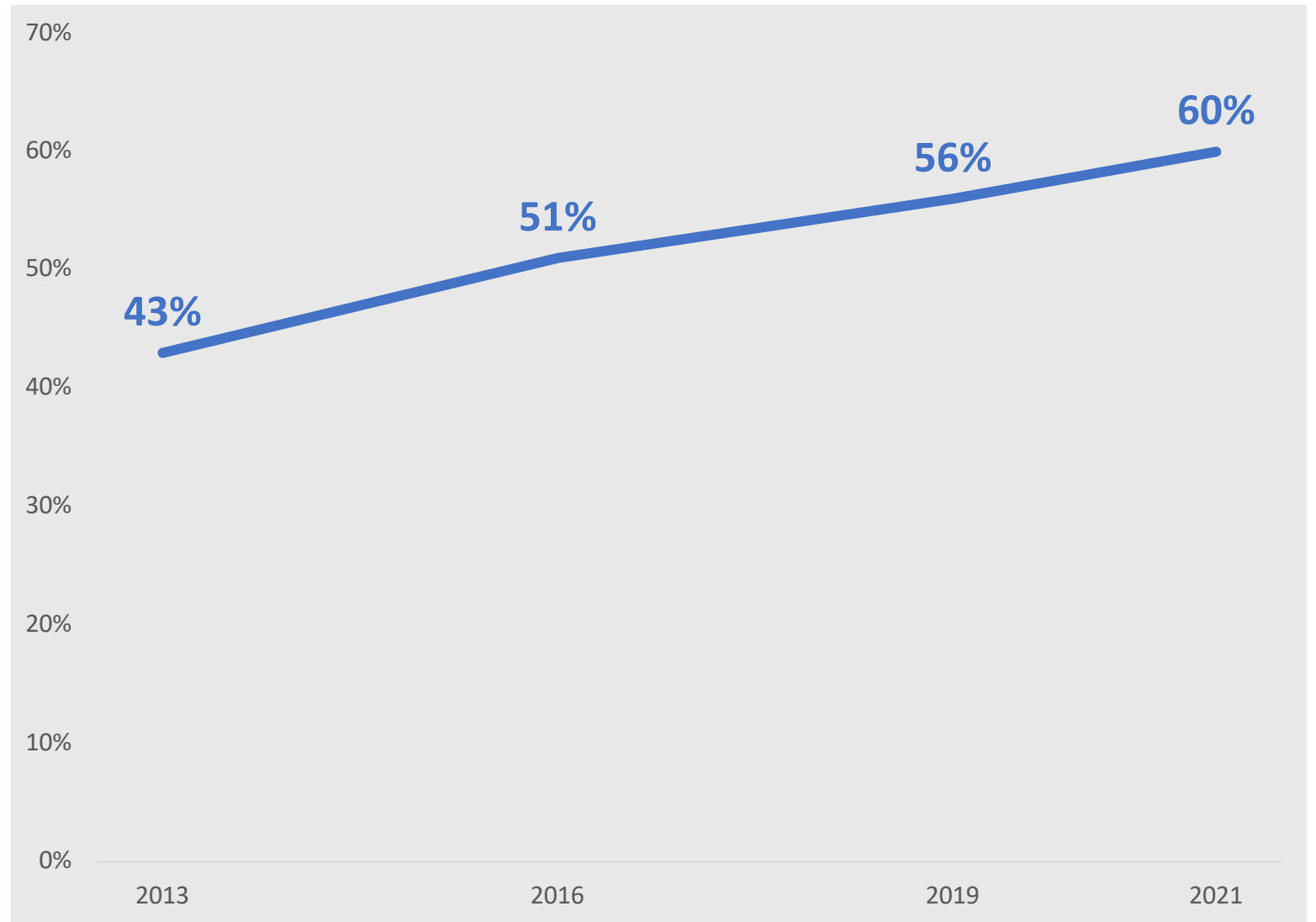
- In the next 12 months, how likely are you to switch to a travel company that reflects how important I&D is to you?

- % likely



But the brand value alignment is rising generally

- “I tend to buy brands that reflect my personal values”
- **% agree, Great Britain**



What's coming
over the
horizon?



Travel is an area where the public are deeply conflicted

42%

Agree “The only way to reduce carbon emissions in the aviation industry is for **fewer people to fly**”

Sustainable Skies / Ipsos

Base: 2,247 nationally representative adults aged 16-75 in UK, 6-10 April 2023.

But flying is important

• 58%

UK adults agree that **there are important social and economic benefits of air travel to and from the UK**

Base: 2,247 nationally representative adults aged 16-75 in UK, 06-10 April 2023.

So people are split on further government intervention

It has been suggested that tax on airfares could be increased to encourage people to fly less by making flying more expensive, to reduce aviation carbon emissions.

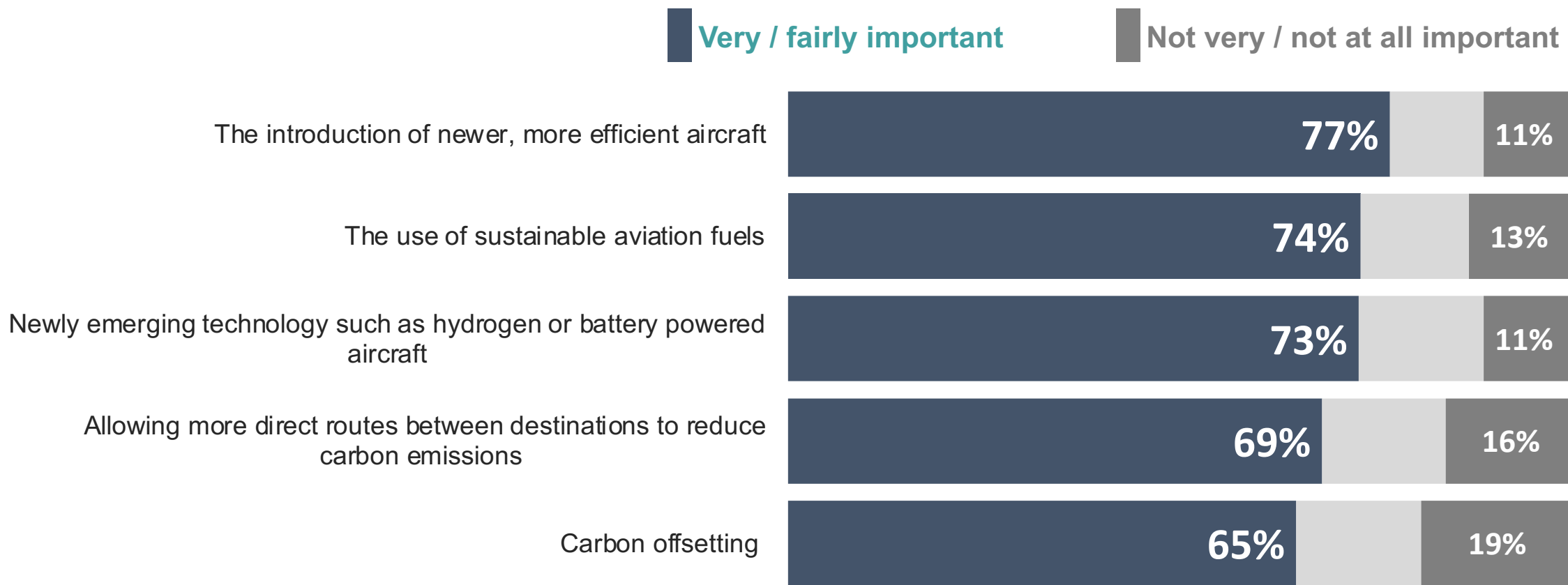
To what extent would you support or oppose an increase in tax on airfares for this purpose if you had to pay more?

30% agree

37% disagree

And they share the faith in new sustainable technologies

To what extent, if at all, do you think each of the following technologies will be important in reducing the aviation industry’s carbon emissions by 2050?



In conclusion...

• 1

- **Britain is still facing an uncertain future – people, employees and businesses.**
- But intent to travel is still strong

• 2

- **In tight times the importance of values and leadership is paramount**
- Diversity, wellbeing and sustainability are key!

• 3

- **Travel looks set to continue its recovery**
- A hopeful narrative for the sector – but remember to expect the unexpected...



THANK YOU

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