

**89**  
DEGREES  
EAST

**SYD**  
Sydney Airport

# National Sentiment Towards Sustainable Aviation Fuel

Quantitative Research Report Findings

March 2026



## Acknowledgement of Country

We acknowledge the Traditional Custodians of country throughout Australia and their connections to lands, waters and communities.

We pay respect to Aboriginal and Torres Strait Islander cultures; and to Elders past and present.

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# Project background and Methodology



# Research Approach

**This study was designed to provide a robust temperature check of the Australian community sentiment towards Sustainable Aviation Fuel (SAF).**

**The research captures the views of 1,002 Australian adults aged 18 years and over, representing the general population.**

## Research objectives

The research aims to:

- Assess current levels of concern regarding carbon emissions and environmental impact from air travel.
- Measure familiarity with Sustainable Aviation Fuel and gauge the level of support or opposition to the use of SAF in Australia.
- Understand the level of support or opposition to developing a domestic SAF industry.
- Understand the key drivers of support and identify the concerns underpinning opposition.
- Identify messages that strengthen public support in the community.
- Explore willingness to pay for SAF across different travel routes and classes of travel.

## Methodology

The research was conducted by 89 Degrees East on behalf of Sydney Airport via a five-minute online survey among n=1,002 Australians aged 18 years and over. Respondents were recruited through Pure Profile's established consumer opt-in panel.

The sample is nationally representative by age, gender and state, and weighted to ABS population benchmarks. Fieldwork was conducted from 24 February to 2 March 2026. The sample is nationally representative and robust, with a margin of error of  $\pm 3.1$  percentage points at the 95% confidence level.

# Demographic Sample Profile

**n = 1,002**

**Australian adults aged 18 years and over representative of the national population.**

<b>Gender</b>	51% Male 49% Female
<b>Age</b>	11% 18-24 years 18% 25-34 years 18% 35-44 years 16% 45-54 years 15% 55-64 years 22% 65+ years
<b>Location</b>	32% NSW 26% VIC 20% QLD 10% WA 7% SA 2% TAS 1% NT 2% ACT  66% Metropolitan 34% Regional
<b>Voting preference at last feral election</b>	42% Australian Labor Party 23% Liberal Party of Australia 12% Pauline Hanson's One Nation Party 9% Australian Greens 5% Independent Candidate 2% Other 5% I did not vote 3% Prefer not to say

<b>First Nations background</b>	91% No 6% Yes, Aboriginal 0% Yes, Torres Strait Islander 1% Yes, both Aboriginal and Torres Strait Islander 1% Prefer not to say
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<b>Household status</b>	11% Living with parent(s) 19% Living on my own or with housemates 10% Living with a partner / spouse, no kids 8% Parent / guardian, with youngest under 4 16% Parent / guardian, with youngest aged 5-12 7% Parent / guardian, with youngest aged 13-18 6% Parent / guardian, with youngest aged over 18 22% Single or couple with all children living out of home
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<b>Highest level of education</b>	4% Secondary school – year 9 and below 23% Secondary school – years 10 and above 17% Certificate 15% Diploma / Advanced Diploma 27% Bachelor Degree 12% Postgraduate Degree or above
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<b>Current working situation</b>	43% Working full-time 17% Working part-time or casual 2% Looking for work 3% Business owner 4% Student studying at university, TAFE, college or other institution 1% Full-time parent – intend to return to work or study 1% Full-time parent – do not intend to return to work 21% Retired 6% Unemployed 2% Other
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*The percentages reflect the weighted proportions by age, and gender in line with ABS.*

# Executive Summary



# Executive Summary – Sustainable Aviation Fuel (SAF)

**This national study provides a snapshot of Australian community sentiment towards Sustainable Aviation Fuel (SAF) and the development of a domestic SAF industry. Overall, the findings show strong public support for SAF once introduced, particularly when the environmental, economic and fuel security benefits are understood. While awareness of SAF is currently low, Australians respond positively to the concept and express clear support for building an Australian-made industry that benefits the environment, the economy and regional communities.**

## **1. Frequent travellers and business flyers are most supportive of SAF**

The survey reflects the views of a broad cross-section of Australians. One-third of respondents had not flown in the past 12 months (33%), while 35% had taken 1–2 flights, 21% had flown 3–5 times and 10% had flown six or more times. Travel was primarily for leisure purposes (82%), followed by visiting friends or family (36%), business travel (27%) and study (3%). Frequent flyers and business travellers tended to be more engaged with environmental issues related to aviation, reporting higher concern about aircraft emissions and show stronger support for SAF compared with those who travel less frequently or not at all.

## **2. Aviation emissions are not top-of-mind, but concern emerges when prompted**

For most Australians, carbon emissions from air travel are not a frequent consideration. More than one-third (36%) say they never think about aviation emissions and almost half (49%) think about them only rarely or sometimes. However, when prompted about the environmental impact of aviation emissions, concern rises. Close to half of Australians (48%) report moderate to high concern about aircraft fuel emissions on the environment. Concern rises significantly among frequent flyers and business travellers, with 57% of those flying 3–5 times annually and 71% of business travellers expressing concern.

## **3. Awareness of Sustainable Aviation Fuel is low**

Public awareness of SAF is currently limited. Only 21% of Australians were familiar with the concept prior to the survey. Awareness increases among frequent travellers but remains low among the broader community, with 78% of non-flyers reporting they are not familiar with SAF. This indicates a clear opportunity for public education and awareness building, particularly given the strong support that emerges once Australians are introduced to the concept.

## **4. Strong support for SAF and domestic industry development**

Once informed about SAF, support is clear and widespread. Nearly seven in ten Australians (69%) support the use of Sustainable Aviation Fuel in Australia, including 36% who strongly support it. Opposition is minimal at just 6%. Support increases further when considering the development of a domestic SAF industry. Nearly three-quarters of Australians (72%) support building a Sustainable Aviation Fuel industry in Australia, with strong support across all traveller segments including those who have not flown recently.

# Executive Summary – Sustainable Aviation Fuel (SAF)

## cont.

### 5. Support driven by environmental and economic benefits

Australians recognise multiple benefits from developing a domestic SAF industry. The strongest driver of support is reducing aircraft emissions (57%), but respondents also highlight broader advantages including the use of renewable Australian resources (49%), climate impact and environmental benefits (48%), improved fuel security (45%), support for Australian manufacturing (43%) and job creation and economic growth (42%). Very few Australians see no benefits from developing the industry (3%).

### 6. Support remains conditional on cost and safety

Despite strong overall support, Australians identify two key concerns. The primary concern is that SAF could increase the cost of air travel, with 39% worried about higher airfares amid existing cost-of-living pressures. Safety and performance are the second major concern, with 31% indicating uncertainty about the technology. More than one-third of Australians (36%) say they would need more information about SAF before fully supporting it, highlighting the importance of public education.

### 7. Information significantly increases support

Providing factual information about SAF in message testing, strongly increases support. Around three-quarters of Australians say they are more likely to support SAF after learning that it can reduce lifecycle emissions by up to 80%, contribute an estimated \$13 billion to the economy and create around 20,000 jobs by 2040, improve Australia's fuel security, and be produced using locally grown crops such as canola. These are key messages that resonate which educate the public and build support.

### 8. Australians show willingness to pay for SAF modestly

While approximately one in four Australians would not support any airfare levy, the majority indicate a willingness to pay modestly to support SAF. Median willingness-to-pay levels are up to \$5 for domestic economy tickets and up to \$10 for international economy tickets, and slightly higher for premium travel.

### 9. Strong preference for Australian-made SAF even if it costs a bit more

Australians clearly favour local production. Nearly half (44%) would prefer Australian-made SAF even if it costs more, compared with 17% who would prefer cheaper imported fuel. This reflects broader support for domestic manufacturing, regional agriculture and national fuel security.

### 10. Expectation of government involvement and support to establish a SAF industry in Australia

There is strong public expectation that government should play a role in supporting the development of a domestic SAF industry. More than three-quarters of Australians (78%) believe government should be involved, including 54% who see it playing a major role. Preferred policy approaches include tax incentives or grants for SAF producers (54%), government funding support (44%) and adjustments to fuel excise (31%).

# Key messages backed by the research findings

## **Australians back Sustainable Aviation Fuel.**

Nearly seven in ten Australians (69%) support the use of SAF in Australia, with only 6% opposed. Once people understand what SAF is and how it works, support strengthens significantly.

## **There is strong support for building a local Australian SAF industry.**

Almost three-quarters of Australians (72%) support developing a domestic SAF industry, including 63% of those who haven't flown in the past year.

## **Australians see SAF as good for the environment.**

Nearly half of Australians (48%) are moderately to very concerned about the environmental impact of aircraft emissions, and 75% are more likely to support SAF after learning it can reduce lifecycle emissions by up to 80%. The main reason to support SAF is to reduce aircraft emissions. The environmental case for cleaner aircraft fuel clearly resonates.

## **Australians see SAF as good for the economy.**

Economic benefits are a major driver of support: 42% cite job creation and economic growth as reasons to support, 43% support Australian manufacturing, and 76% are more likely to support SAF after hearing about its potential \$13 billion contribution to the economy and 20,000 jobs by 2040.

## **Australians support local Australian-made industry and fuel security.**

Australians prefer Australian-made SAF over cheaper imports (44% vs 17%), and 74% are more likely to support SAF when they understand it strengthens fuel security. There is a clear appetite for building sovereign capability, particularly relevant in the global climate. [It's important to note: the survey was conducted prior to the full impacts on oil prices and fuel security from military action in Iran becoming clear, so the argument around fuel security may be understating the case.]

## **SAF is seen as good for farmers and regional Australia.**

Nearly half (49%) support SAF because it uses renewable materials available in Australia, including crops like canola, reinforcing the connection between SAF, regional communities, natural resources, farmers and Australian agriculture.

## **Support is strong, but with cost concerns, most are only willing to pay a modest amount.**

While close to one in four would not support a levy, most Australians are willing to contribute modestly, up to \$5 on a domestic ticket and \$10 on an international economy ticket. The key condition is keeping ticket costs reasonable, as most already feel it's expensive to travel and are under cost pressures.

## **Australians expect leadership from the government.**

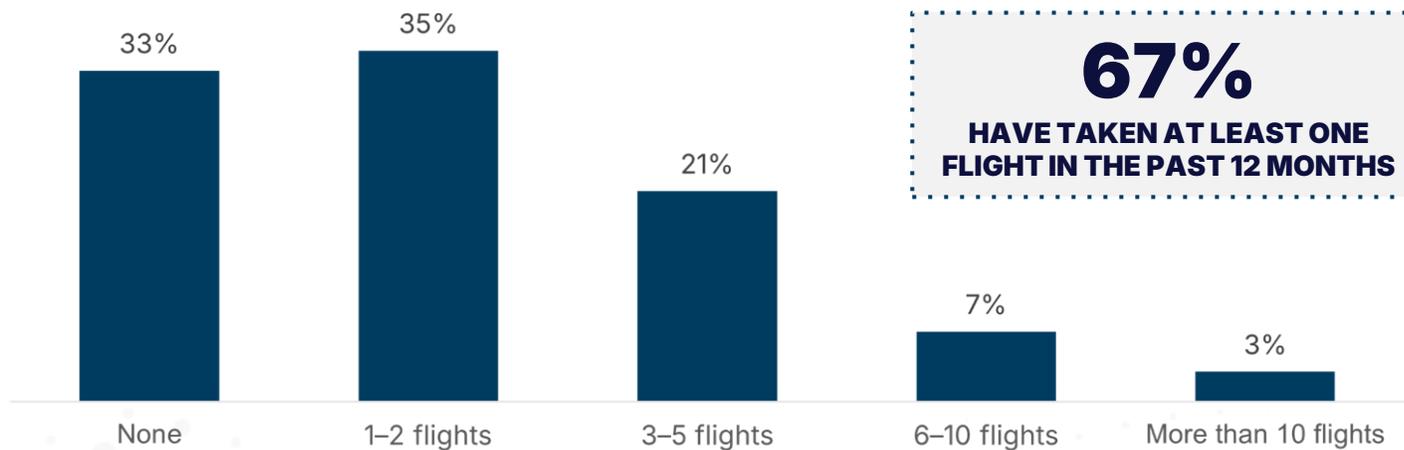
More than three-quarters (78%) believe the government should play a role in supporting the development of a domestic SAF industry, alongside industry investment.

# **Travel Behaviours and Concern about Carbon Emissions**



# Number of flights taken in past 12 months

**Q1. How many flights have you taken in the past 12 months, including both domestic and international?**  
**Base n=1,002**



Over the past 12 months, two in three Australians (67%) have taken at least one flight. The largest group of travellers (35%) flew 1-2 times, followed by 21% who took 3-5 flights. A smaller proportion are frequent flyers, with 7% taking 6-10 flights and just 3% flying more than 10 times.

One third (33%) reported no flights at all.

Those who are more likely to **have taken 6 or more flights in the past 12 months** are:

- Those travelling to visit friends or family (21%) and for business/work travel (30%)
- Those aged 18-24 (17%)
- Hold a postgraduate degree or above (21%)
- Work full-time (16%)

Those who are more likely to **have not travelled in the past 12 months** are:

- Those aged 55-64 (44%) and 65+ (53%)
- Females (39%)
- Live in regional areas (48%)

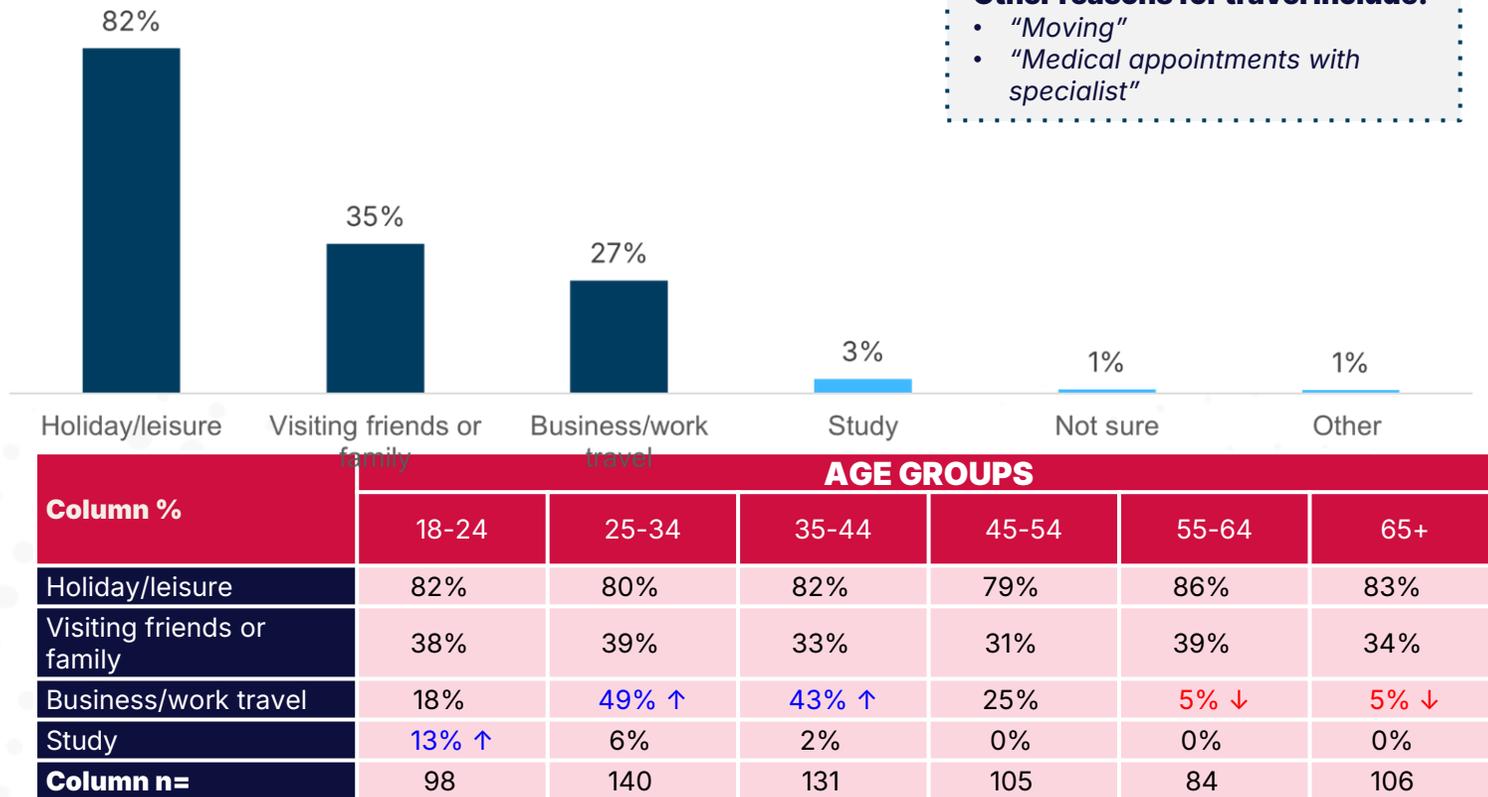
Column %	TRAVEL PURPOSE			
	Holiday/ leisure	Visiting friends or family	Business/ work travel	Study
None	0%	0%	0%	0%
1-2 flights	50% ↓	42% ↓	27% ↓	64%
3-5 flights	34% ↑	37%	43% ↑	17%
6 or more flights	16% ↑	21% ↑	30% ↑	18%
<b>Column n=</b>	544	238	174	23

# Main reasons for air travel in P12M

**Q2. What were the main reasons for your air travel in the past 12 months?**  
**(Select all that apply) Base n=664**

**Other reasons for travel include:**

- "Moving"
- "Medical appointments with specialist"



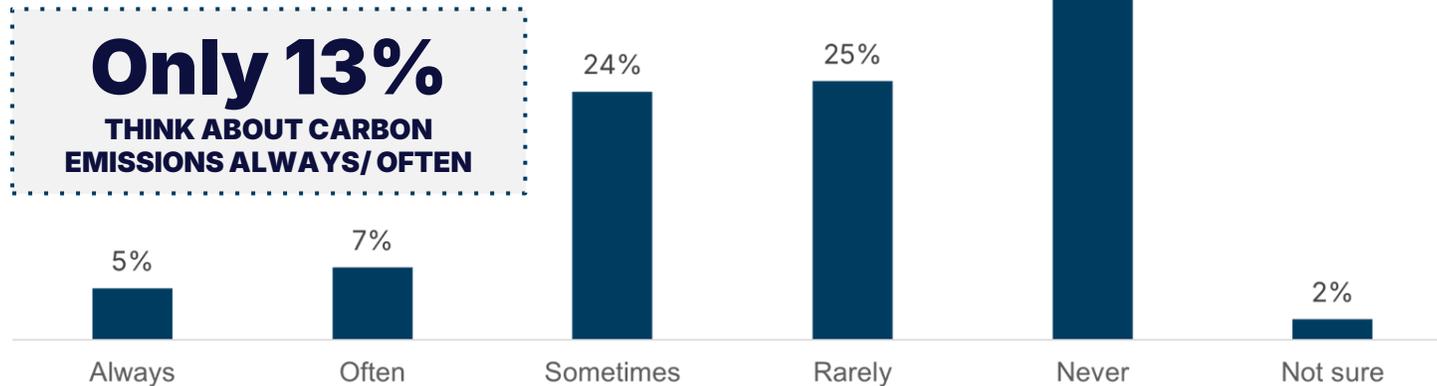
Among those who used air travel in the last 12 months, more than eight in ten reported the reason for travel was for holiday or leisure (82%), followed by visiting friends and family (35%) and business travel (27%).

**Business travellers** are more likely frequent flyers living in metro areas of Australia, the demographic profile includes:

- Have taken 3-5 flights (36%) and 6 or more flights (55%)
- Aged 25-34 (49%) and 45-54 (43%)
- Males (34%)
- Reside in NSW (36%) and Sydney (41%)
- Live in a metro area (32%)
- Hold a bachelor degree (39%) or post graduate degree or above (40%)
- Work full-time (40%)
- Parent/guardian, with youngest child aged under 4 years living with me (54%) and parent/guardian, with youngest child aged 5-12 years living with me (57%)
- ALP voters (32%)

# Carbon emissions when flying is not top of mind for most

**Q3. When you travel by aircraft, how often do you think about the carbon emissions from flying?**  
Base n=1,002



Column %	FLYING FREQUENCY				TRAVELLER TYPE			
	None	1-2 flights	3-5 flights	6 or more flights	Holiday/leisure	Visiting friends or family	Business / work travel	Study
<b>TOP 2 (OFTEN / ALWAYS)</b>	<b>9%</b>	<b>8% ↓</b>	<b>19% ↑</b>	<b>27% ↑</b>	<b>15%</b>	<b>19%</b>	<b>29% ↑</b>	<b>35% ↑</b>
Always	4%	3%	6%	12% ↑	6%	8%	11% ↑	22% ↑
Often	5%	5%	13% ↑	15% ↑	9%	10%	17% ↑	13%
Sometimes	15% ↓	27%	34% ↑	25%	28%	28%	34%	32%
Rarely	22%	30%	25%	18%	26%	27%	20%	18%
Never	49% ↑	34%	21% ↓	29%	30%	26%	18% ↓	14%
Not sure	5% ↑	1%	1%	1%	1%	0%	0%	0%
Column n=	338	349	216	95	544	238	174	23

Thinking about carbon emissions when flying remains relatively low among Australians.

Over one-third (36%) say they never think about emissions when flying, with a further 25% rarely considering the impact. While 37% think about emissions at least sometimes, only 13% report doing so often or always.

Those who are more likely to **regularly think about carbon emissions from flying (always / often)** are:

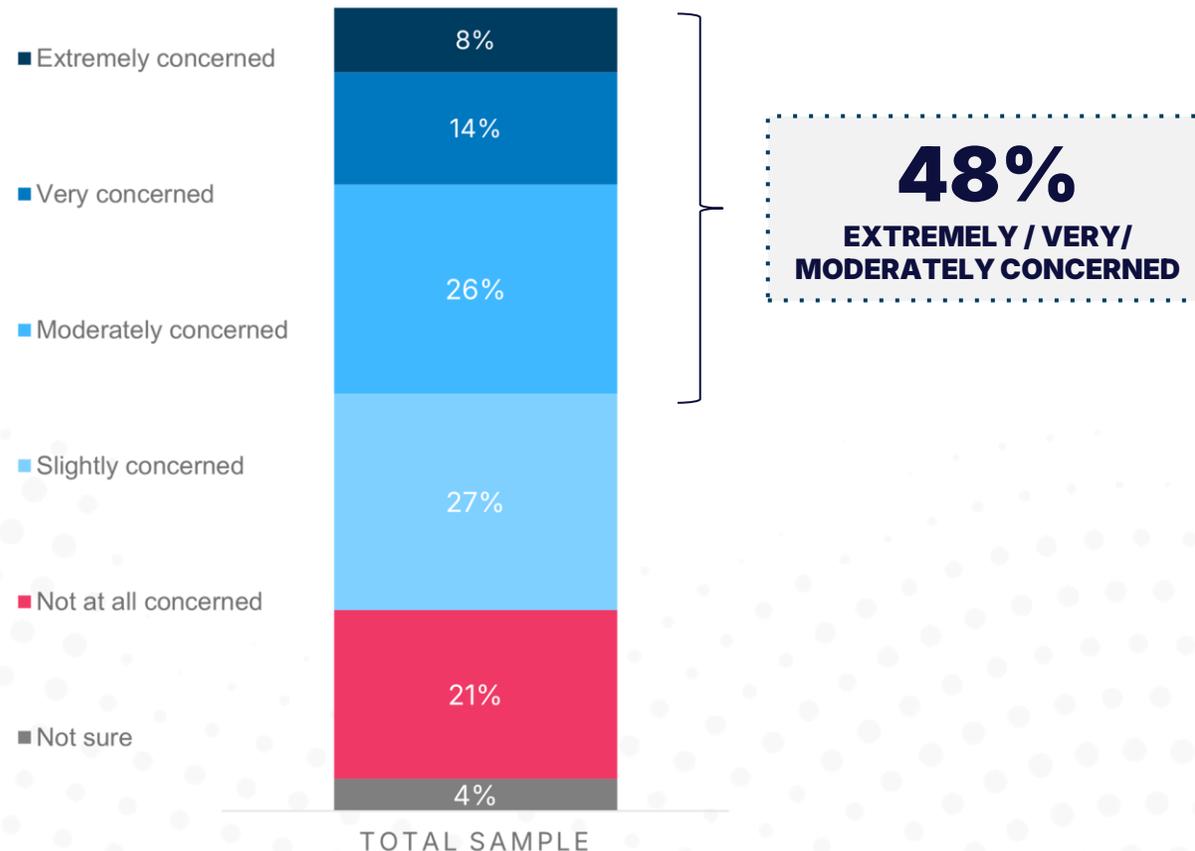
- Have taken 3-5 flights (19%) and 6 or more flights (27%)
- Travel for business/work (29%) compared to leisure travellers (15%)
- Aged 25-34 (20%)
- Parent/guardian, with youngest child aged under 4 years living with me (23%) and parent/guardian, with youngest child aged 5-12 years living with me (24%)
- Hold a bachelor degree (18%) or post graduate degree or above (22%)

Those who are more likely to **never think about carbon emissions when flying** are:

- Have not travelled in past 12 months (49%)
- Those aged 55-65 (49%) and 65+ (46%)
- One Nation voters (55%)

# When prompted, close to half have high concerns about the environmental impact

## Q4. How concerned or not are you about the environmental impact of carbon emissions from aircraft fuel? Base n=1,002



Close to one in two Australians (48%) are moderately or very/extremely concerned about the environmental impact of aircraft fuel emissions. Concern rises among more frequent flyers, business travellers and those aged 25-44 years.

Those who are more likely to have high **concern about the environmental impact of carbon emissions from aircraft fuel** are:

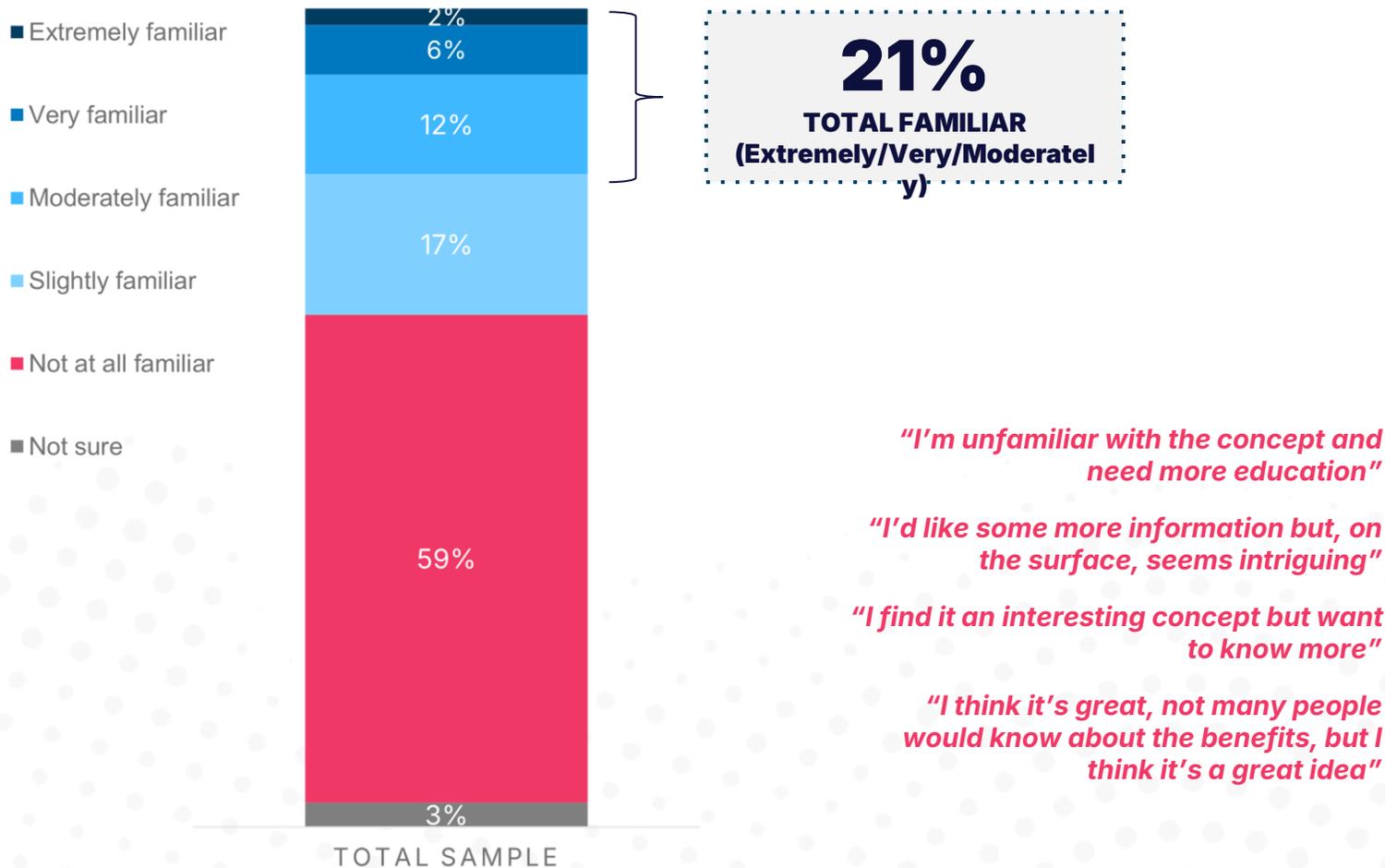
- Have taken 3-5 flights (57%) and 6 or more flights (56%)
- Travel for business/work (71%) and studying (86) compared to leisure travellers (51%)
- Aged 25-34 (38%) and 35-44 (33%)
- Males (27%)
- First Nations people (83%)
- Live in NSW (26%), Sydney (33%)
- Reside in metro areas (25%)
- First Nations people (68%)
- Parent/guardian, with youngest child aged 5-12 years living with me (62%)
- Hold a bachelor degree (57%) or post graduate degree or above (65%)

# **Familiarity and Support of Sustainable Aviation Fuel**



# Familiarity with Sustainable Aviation Fuel is low in the public

Q5. Before today, how familiar were you with Sustainable Aviation Fuel (SAF)? Base n=1,002



Awareness of Sustainable Aviation Fuel (SAF) is limited, with 59% reporting they were not at all familiar. A further 17% say they were only slightly familiar.

Only 21% of Australians were moderately or very familiar with SAF prior to the survey.

Awareness increases among frequent flyers and business travellers and lowest among those who haven't flown in the last 12 months (78% of those who had not flown in the past year were not at all familiar with SAF).

This indicates a significant opportunity for public education about SAF.

Those who are more likely to have **high familiarity (moderately/very/extremely) with Sustainable Aviation Fuel** are:

- Frequent flyers, taken 3-5 flights (36%) and 6 or more flights (39%)
- Travel for business/work (57%)
- Aged 25-34 (61%)
- Parent/guardian, with youngest child aged under 4 years living with me (43%) and parent/guardian, with youngest child aged 5-12 years living with me (43%)
- Hold a bachelor degree (31%) or post graduate degree or above (41%)
- Work full-time (33%)

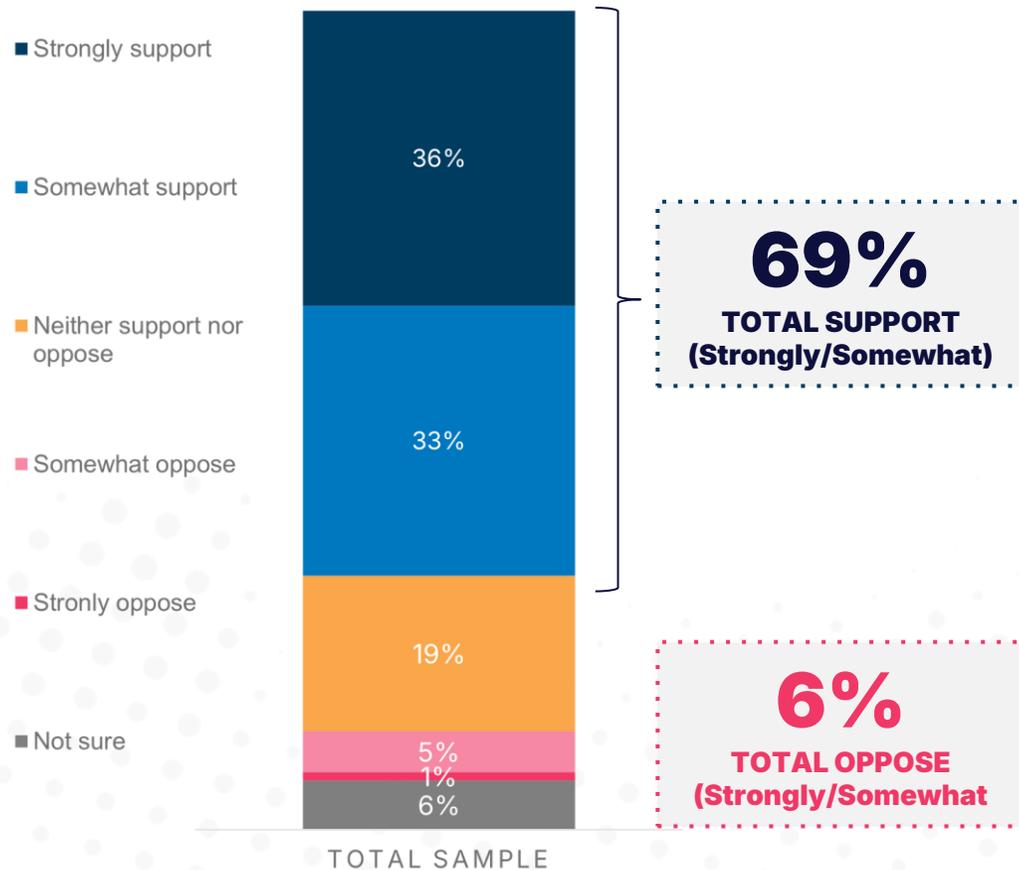
# Business flyers are more familiar with SAF

## Q5. Before today, how familiar were you with Sustainable Aviation Fuel (SAF)?

Column %	TRAVEL PURPOSE			
	Holiday/ leisure	Visiting friends or family	Business/ work travel	Study
<b>TOP 3 FAMILIAR</b>	<b>26%</b>	<b>30%</b>	<b>57% ↑</b>	<b>63% ↑</b>
Extremely familiar	3%	4%	7% ↑	3%
Very familiar	8%	10%	20% ↑	19%
Moderately familiar	15%	16%	30% ↑	41% ↑
Slightly familiar	20%	19%	22%	9%
Not at all familiar	52%	50%	20% ↓	24% ↓
Not sure	2%	2%	1%	4%
Column n=	544	238	174	23

# Over two-thirds support SAF use in Australia

**Q6. Overall, to what extent do you support or oppose the use of Sustainable Aviation Fuel in Australia?**  
**Base n=1,002**



## Respondents read the following statement before answering the question:

Sustainable Aviation Fuel (SAF) is a lower-emissions alternative to jet fuel made from renewable or waste materials such as used cooking oil, agricultural residues and captured carbon instead of fossil fuels. It can cut lifecycle greenhouse gas emissions by up to about 80% compared with conventional jet fuel.

SAF is refined to the same safety and performance standards as regular aviation fuel and blended with it so it can be used in today's aircraft and infrastructure without modification. Although aircraft still emit carbon when burning SAF, its renewable origins mean far less new carbon is added to the atmosphere over its full lifecycle.

Once introduced to the concept of Sustainable Aviation Fuel, support is strong. Overall 69% of Australians support the use of Sustainable Aviation Fuel (SAF), with 36% strongly supporting and 33% somewhat supporting its adoption, indicating a clear positive sentiment toward SAF.

Opposition is low at 6%, while 19% are neutral and 6% unsure.

Support is highest among frequent flyers and business travellers.

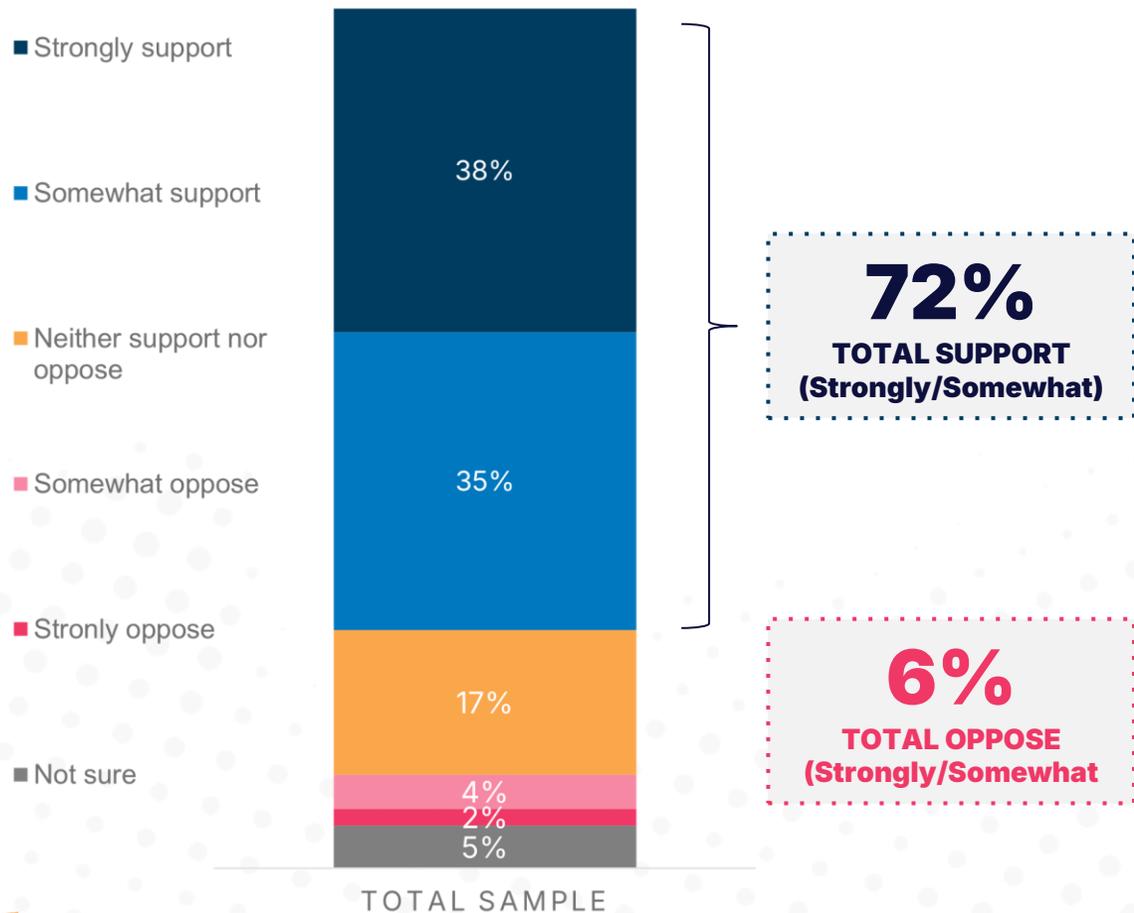
Those who are more likely to **support Sustainable Aviation Fuel** are:

- Have taken 3-5 flights (46% strongly support and 77% total support)
- Those travelling business/work (48% strongly support and 78% total support)
- Those aged 65+ (78% total support)

*'I think if it can remain Australian made and owned would be a great thing for Australia and is Australians'*

# Support strengthens for developing a domestic SAF industry in Australia

**Q7. And to what extent do you support or oppose developing a Sustainable Aviation Fuel industry in Australia? Base n=1,002**



Australians show strong backing for a domestic Sustainable Aviation Fuel (SAF) industry, with nearly three quarters expressing support (38% strongly and 35% somewhat).

Support rises to 83% among those flying 3–5 times annually. Even among non-flyers, 63% support developing a local SAF industry. Opposition is low at 6%, while 17% are neutral and 5% unsure.

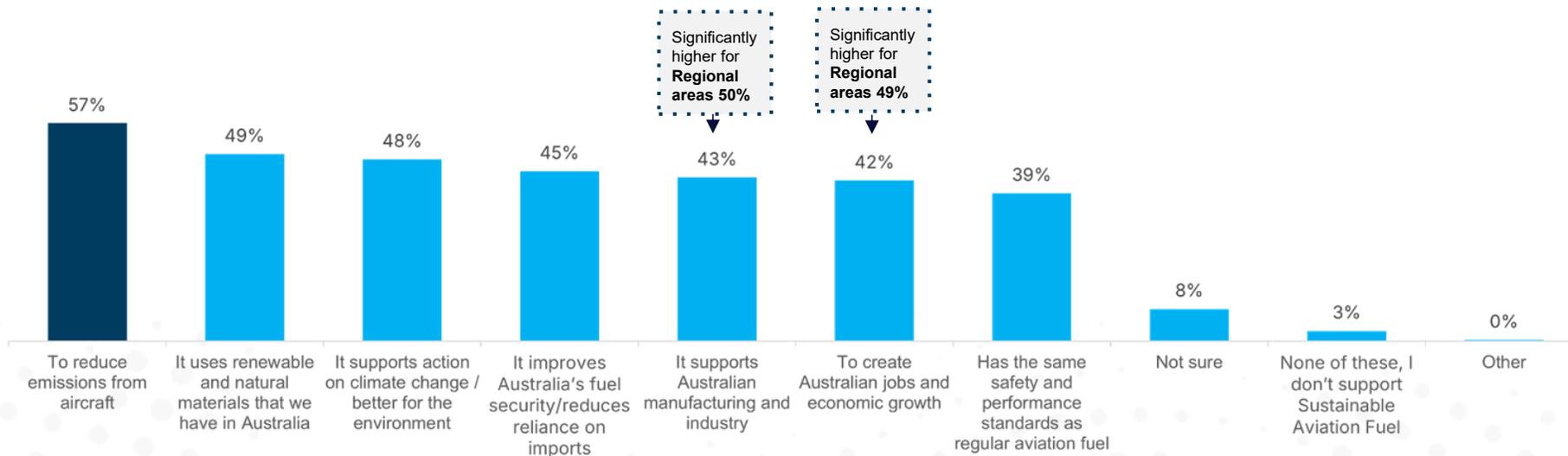
Those who are more likely to be **support developing a Sustainable Aviation Fuel industry in Australia** are:

- Have taken 3-5 flights (83%)

*"I think it's a great idea. Making sustainable aviation fuel in Australia feels like a smart step toward cleaner travel and a better future. It shows effort to reduce pollution while still allowing people to fly. As long as it's truly sustainable"*

# Support for SAF is strongly driven by environmental and economic benefits

**Q8. Which of the following are reasons you would support developing a Sustainable Aviation Fuel industry in Australia? (Select all that apply) Base n=1,002**



*"I feel elated knowing that there is a solution to carbon emissions from aircraft, even though it isn't 100% but it is a start of something spectacular and healthy."*

*"I'm supportive of introducing Australia-made sustainable Aviation Fuel because it's a smart move to cut aviation emissions with locally produced fuel instead of relying on imports."*

Support for a domestic SAF industry is strongly driven by environmental benefits, with 57% citing reduced aircraft emissions as a key reason for support, 49% support SAF as it would use renewable and natural materials that are in abundance in Australia and 48% believe it is better for the environment and will support climate change.

Those living in regional areas are more likely to support SAF if it supports Australian manufacturing and industry (50%) and creates Australian jobs and economic growth (49%). Those aged 65+ were more likely to support SAF for the benefits of improving Australia's fuel security (59%), supporting Australian manufacturing and industry (54%) and for having the same safety and performance as regular aviation fuel (57%).

*"I think sustainable Aviation fuel in Australia is a good idea. It would cut emissions, create jobs, support local industries, and reduce reliance on imports. It might cost a bit more but the benefits make it worth it."*

*"I strongly support the introduction of Australia-made Sustainable Aviation Fuel. It is an important step toward reducing carbon emissions, strengthening energy security, and supporting local industries and jobs."*

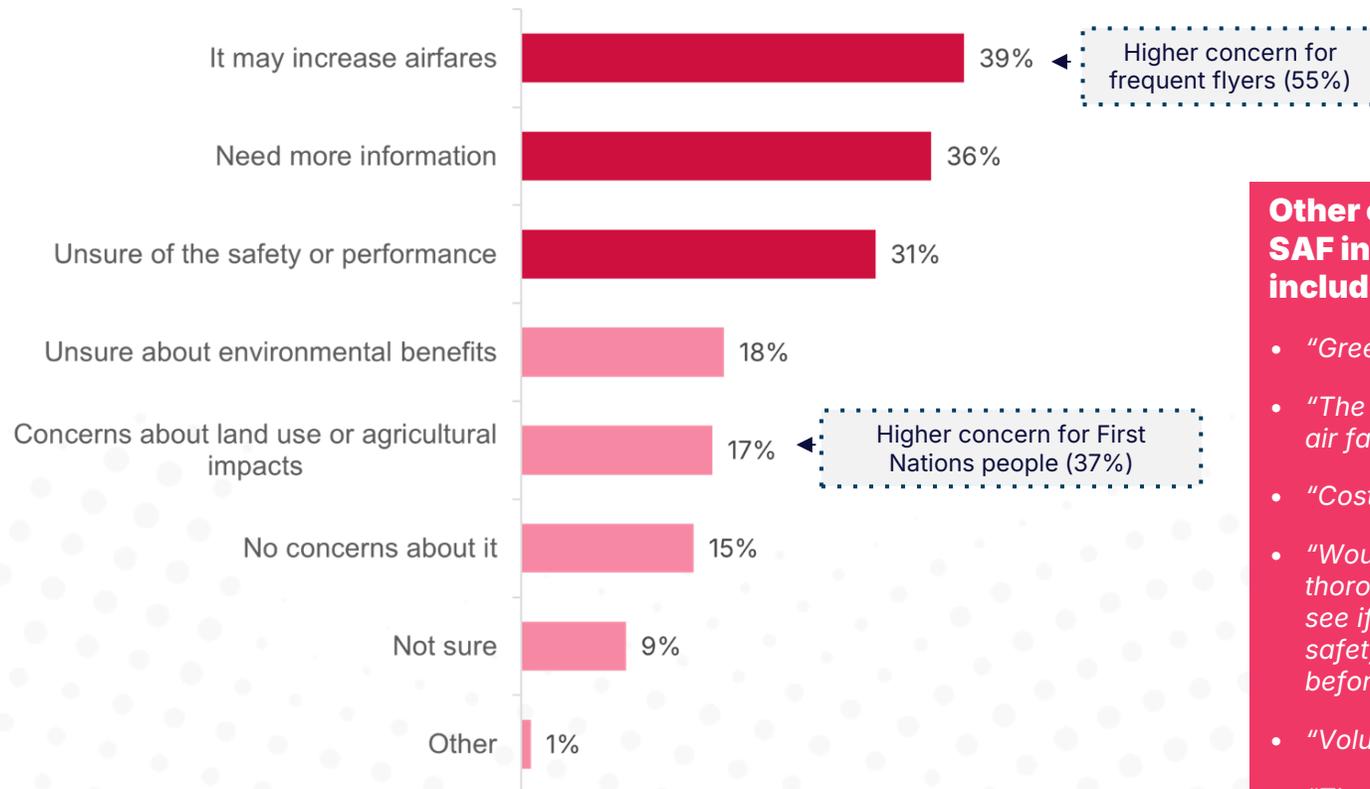
*"Producing our own fuel and creating jobs in our country is good and we are not relying on other countries."*

*"I support Australian-made SAF for its environmental and economic benefits, like reducing emissions and boosting local jobs. While price concerns are valid, the long-term gains are worth it. The government should help by offering incentives to make SAF more accessible."*



# The primary concerns relate to cost increases and safety

**Q9. What concerns, if any, do you have about Sustainable Aviation Fuel in Australia? (Select all that apply)**  
**Base n=1,002**



## Other concerns about SAF in Australia include:

- "Greenwashing"
- "The effect on the cost of air fares"
- "Cost, is it worth it?"
- "Would have to be thoroughly tested first to see if had no effects or safety on jet engines before it's implemented"
- "Volume of SAF available."
- "That the airline would use it as an excuse to increase the cost of flights"

Around four in ten Australians (39%) are concerned that SAF may increase airfares, many already feel flight costs are expensive and are struggling with the cost of living.

The second top concern is safety, with 31% feeling unsure about SAF's performance and safety. Over one-third (36%) say they would need more information to fully support SAF.

This indicates strong support, but contingent on reassurance about price and safety standards.

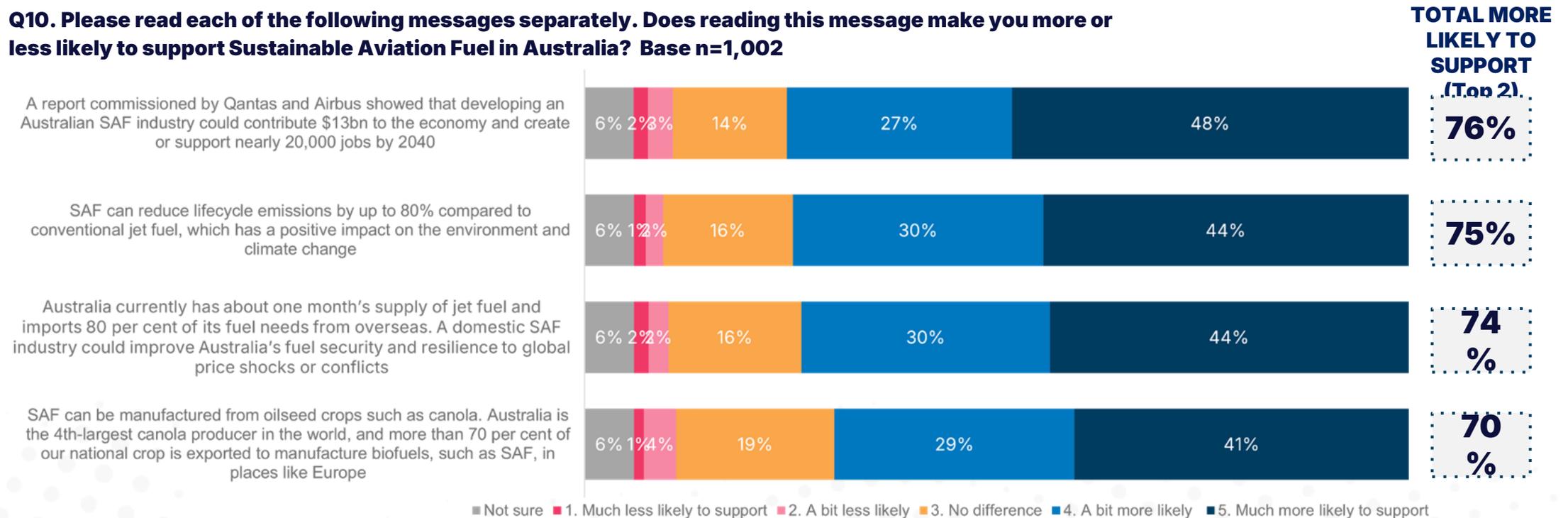
Only 15% reported having no concerns, indicating that while support for SAF is strong, many Australians want more clarity on its implications.

## Differences by demographics:

- Those who fly 6 or more times a year are more concerned that SAF may increase airfares (55%).
- First Nations people (37%) are more likely to be concerned about the impact of SAF on land use or agricultural impacts.

# Message testing demonstrates that factual information significantly strengthens

**Q10. Please read each of the following messages separately. Does reading this message make you more or less likely to support Sustainable Aviation Fuel in Australia? Base n=1,002**



After reading that SAF can reduce lifecycle emissions by up to 80%, 75% said they are more likely to support it. Learning about potential economic contribution (\$13bn and 20,000 jobs by 2040) increases support among 76%. Information about improving Australia's fuel security also resonates with 74%, while 70% are more likely to support SAF after learning it can be produced from Australian-grown canola. **These findings highlight the effectiveness of fact-based messaging, which builds understanding and knowledge about SAF.**

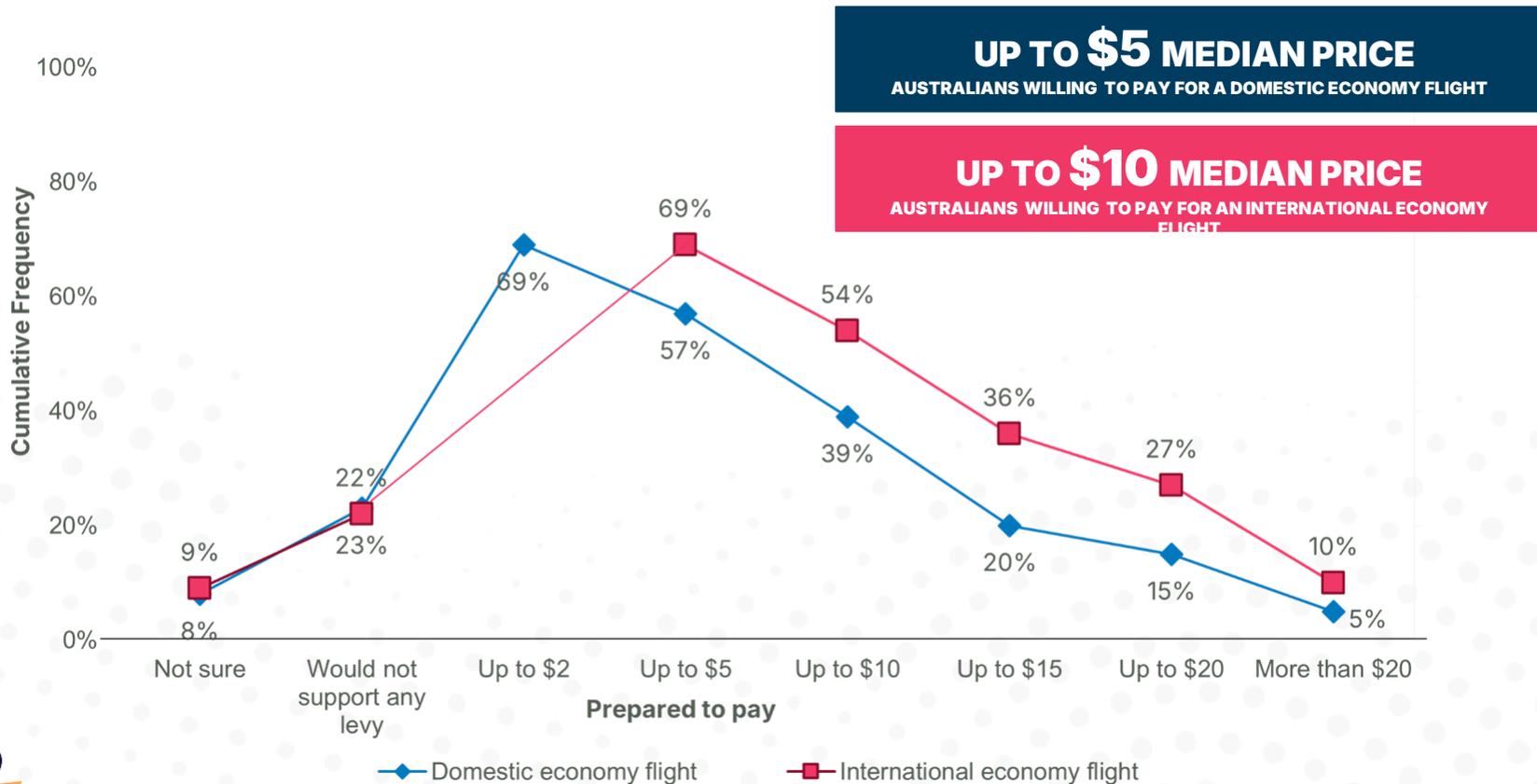
**Differences by demographics:**

- Those who travel for holiday/leisure (75%) are more likely to support SAF knowing it can be manufactured from oilseed crops such as canola. Australia is the 4th-largest canola producer in the world, and more than 70 per cent of our national crop is exported to manufacture biofuels, such as SAF, in places like Europe

# Willingness to pay for SAF on an Economy flight is moderate

**Q11. If Australia implemented a small levy which was added to airfares to support the use of Sustainable Aviation Fuel, what is the most you would be willing to pay per ticket for the following flight types? Base n=1,002**

## Economy flights



Willingness to contribute financially is present but measured. Close to one in four Australians would not support any airfare levy.

For domestic economy flights, the median willingness to pay is up to \$5 per ticket (57% willing to pay at this price).

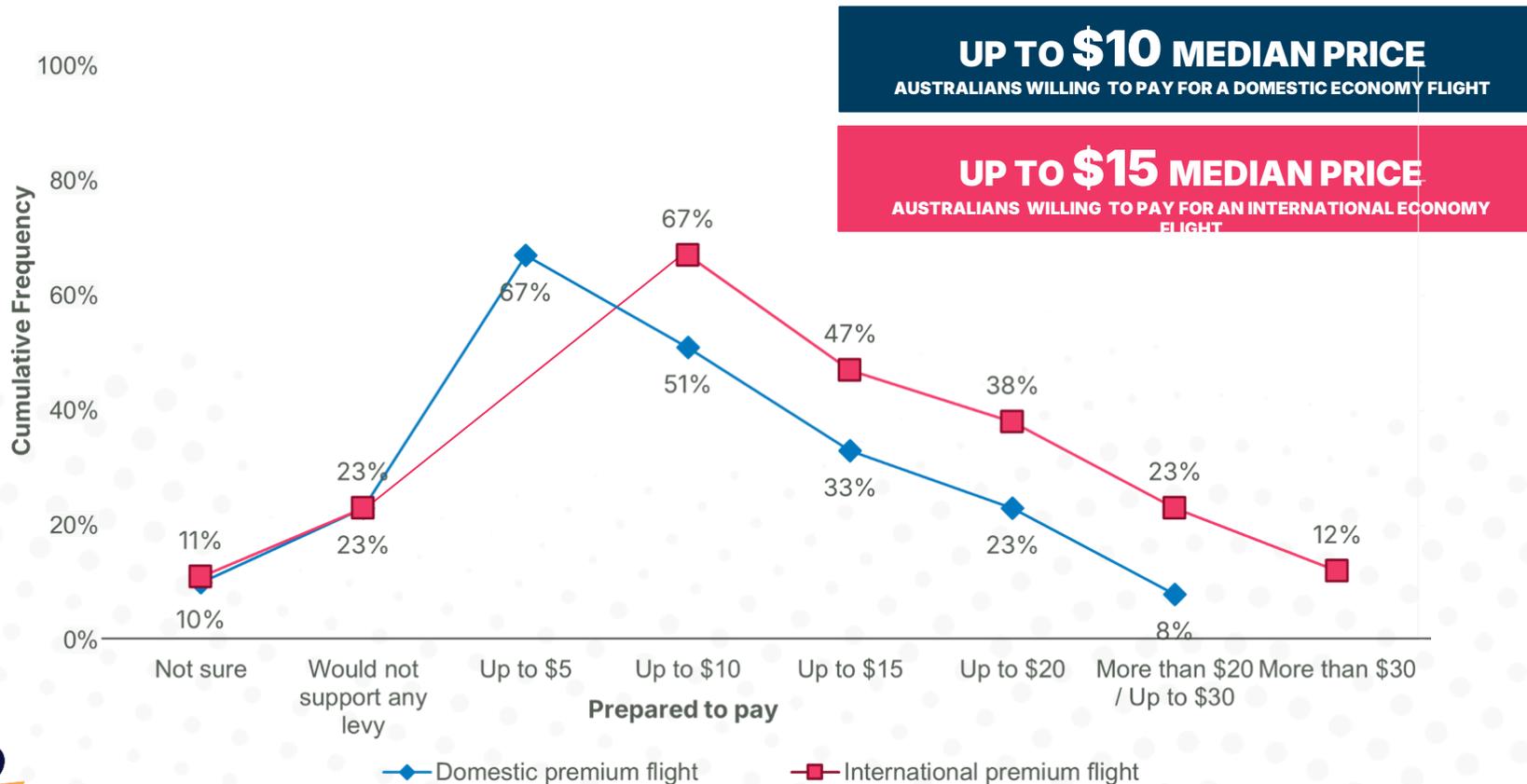
For international economy flights, the median is up to \$10 (54% willing to pay at this price).

Business travellers are more likely to pay a small levy on flights, with only 12% reporting they would not support a levy on domestic economy flights.

# Willingness to pay a SAF level on premium flights

**Q11. If Australia implemented a small levy which was added to airfares to support the use of Sustainable Aviation Fuel, what is the most you would be willing to pay per ticket for the following flight types? Base n=1,002**

## Premium flights (premium economy/business)

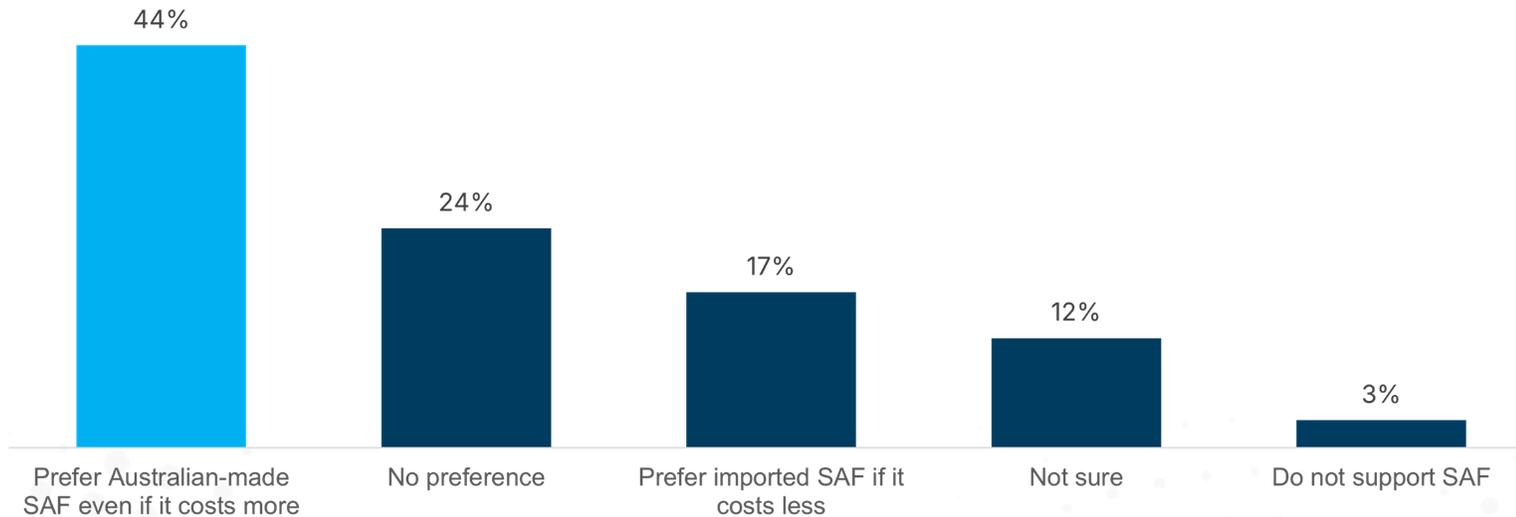


Support for a small SAF levy on premium flights mirrors economy trends, but passengers are generally willing to pay more, suggesting a stronger willingness to absorb higher levies for premium flight classes, particularly on international routes.

For domestic premium seats, the median is up to \$10 (51% willing to pay at this price) and for international premium seats, the median price is up to \$15 (47% willing to pay at this price).

# A clear preference for Australian-made SAF and a local industry

**Q12. If Australian-made Sustainable Aviation Fuel costs more than imported SAF, which would you prefer?**  
Base n=1,002



*"I feel inspired and hopeful knowing that Australia is producing Sustainable Aviation Fuel locally it shows innovation, environmental responsibility, and a real commitment to a cleaner future for aviation."*

*"As long as it doesn't impose a significant cost to airfares I believe it is a good example of how Australia should manufacture more locally"*

*"It is a necessity to stop Australia's reliance on imported aviation fuel and lessen our carbon footprint"*

Australians show a clear preference for Australian-made SAF and support the development of a local industry. 44% would prefer locally produced SAF even if it costs more, compared with 17% who prefer lower-cost imported SAF. One in four (24%) have no preference, and 12% are unsure.

This sentiment reflects strong support for local industry development.

Those who are more likely to **prefer Australian-made SAF even if it costs more** are:

- Those aged 65+ (56%)
- Single or couple with all children living out of home (55%)

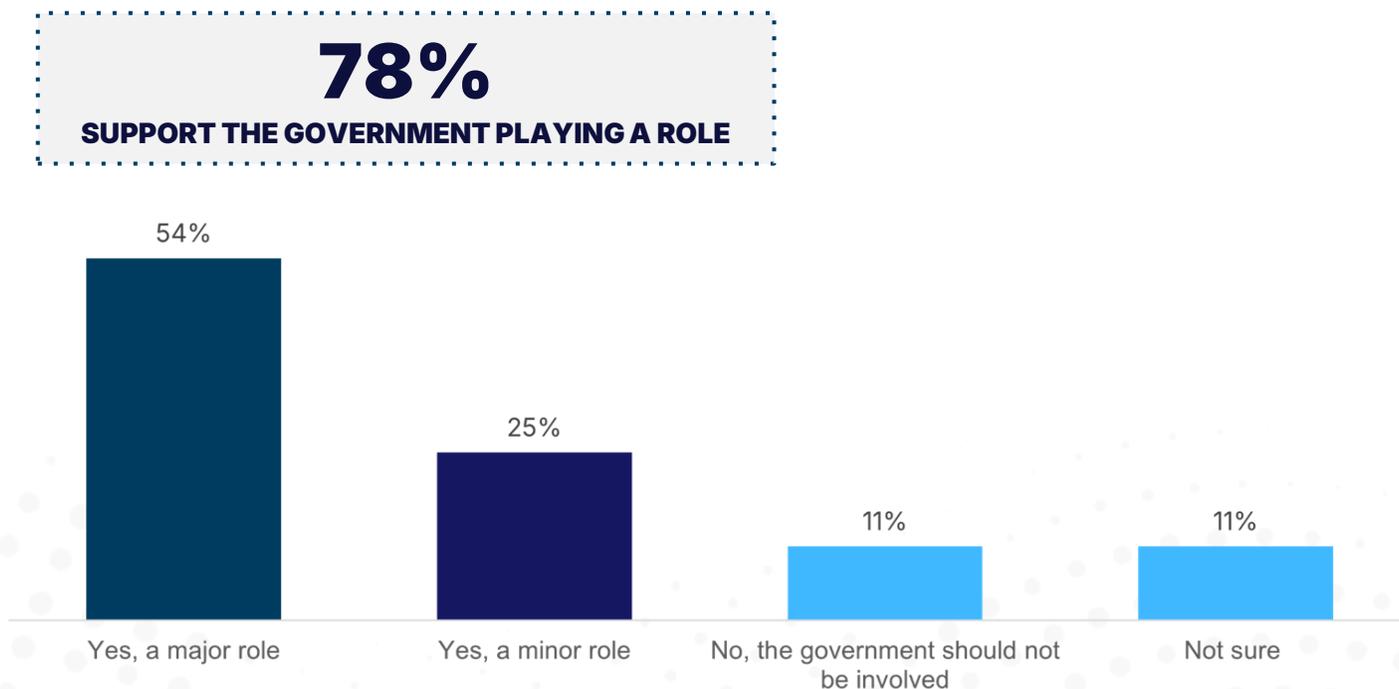
Those who are more likely to **prefer imported SAF if it costs less** are:

- Reside in Metro areas (20%)

# Expectation that the government should play a role in developing a SAF industry

**Q13. Overall, do you think the government should play a role in supporting the development of a Sustainable Aviation Fuel industry in Australia, to help reduce its price?**

Base n=1,002



There is a broad expectation that the government should play a role in developing a domestic SAF industry.

Overall, 78% believe the government should be involved, including 54% who see it playing a major role. Only 11% believe the government should not be involved.

Support for government involvement is particularly strong among business travellers and frequent flyers.

Those who are more likely to **think that the government should play a major role** are:

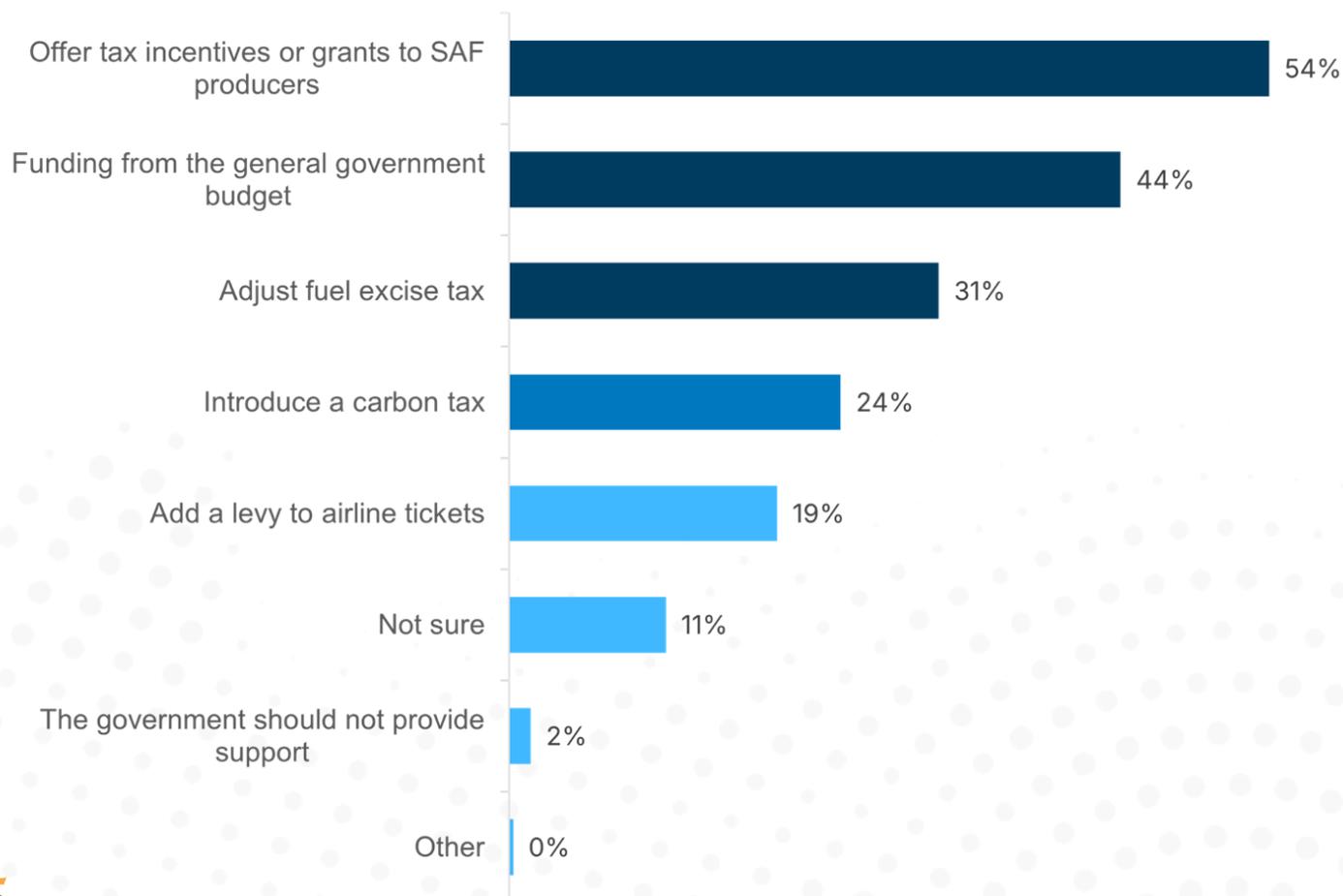
- Have taken 6 or more flights (68%)
- Travel for business/work (72%)
- First Nations people (80%)
- Parent/guardian, with youngest child aged under 4 years living with me (69%) and parent/guardian, with youngest child aged 5-12 years living with me (68%)
- Have a postgraduate degree or above (75%)
- Work full-time (59%)

Those who are more likely to **think that the government should not be involved** are:

- Males (14%)
- Retired (17%)
- One Nation voters (24%)

# Australians back financial incentives for government support of SAF

**Q14 (If a or b in Q13) In what ways do you think the government should support the development of Sustainable Aviation Fuel in Australia? Select all that apply Base n=785**



Preferred policy mechanisms include tax incentives or grants to producers (54%), general budget funding (44%) and adjustments to fuel excise (31%), while fewer support carbon taxes (24%) or adding a levy to airline tickets (19%).

### Differences by demographics:

- Those who are 65+ (71%) and single or couple with all children living out of home (68%) are more likely to think the government should **offer incentives or grants to SAF producers**.
- Frequent flyers who have taken 6 or more flights (64%), reside in metro areas (48%) and First Nations people (63%) are more likely to think funding should come from **general government budget**.
- Those travelling for business/work (35%, aged 25-34 (36%), live in NSW (32%), Sydney (36%), reside in metro areas (48%) and have a bachelor's degree.

# Final Comments

*"How do you feel about the introduction of SAF?"*



# Strong support for SAF among leisure travellers, with price and safety caveats

## Q15. Please share your comments and views to help us understand how you feel about the introduction of Australia-made Sustainable Aviation fuel.

### Open ended feedback from Leisure travelers were largely positive about the introduction of Australian-made Sustainable Aviation Fuel (SAF), citing environmental and economic benefits, but remain cautious about ticket price increases and safety assurances.

- **Strong environmental and climate support:** Many leisure travellers express strong support for SAF, highlighting its positive impact on reducing carbon emissions and protecting the planet. They view SAF as a necessary step towards tackling climate change and ensuring a cleaner future for generations to come
- **Economic growth and local jobs drive support:** leisure travellers see SAF as a catalyst for economic growth, job creation, and increased local manufacturing. Many view the initiative as an opportunity for Australia to become more self-reliant and decrease its dependence on imported fuels
- **Strong fuel security and national resilience:** Support for Australian-made Sustainable Aviation Fuel (SAF), highlights its crucial role in reducing Australia's dependence on imported fuels. Domestic production of SAF is seen as an essential step towards safeguarding the nation against international supply disruptions, strengthening energy security, and building a more self-reliant future, ensuring that Australia can maintain control over its vital energy resources in a changing global landscape.
- **Support hinges on airfare affordability:** while many are supportive in principle, a number of travellers stress that their support depends on SAF not leading to higher ticket prices. Price sensitivity is high, with travellers wary of any additional costs being passed onto consumers
- **Travellers want assurance on SAF safety:** safety and reliability are critical for travellers, with many expressing a need for independent research and proof that SAF is as safe and effective as traditional jet fuels before fully supporting its widespread adoption
- **Desire for more information and government support:** A notable portion of travellers want more detailed information and education about how SAF works, along with clear government involvement—either through incentives, funding, or strict regulation to ensure industry compliance and public benefit



"I think sustainable Aviation fuel in Australia is a good idea. It would cut emissions, create jobs, support local industries, and reduce reliance on imports."

"I feel it will be a good thing to invest in considering the benefits attached."

"Anything to improve climate change is important."

"I think SAF would be a good step in the right direction and would definitely help out with reducing carbon emissions and the environment."

"It seems a no brainer if it can create local jobs, reduce supply chain risk and reintroduce some manufacturing into Australia."

"Any viable Australian Industry providing job security and improving environmental outcomes for Australia is worth supporting."

"It would be great for extra job opportunities and to have a source in our own country would see many benefits."

"We should be supporting the establishment of a local industry to provide Sustainable aviation fuel to reduce reliance on imports.""

"I support the introduction as long as it doesn't mean more expensive tickets."

"As long as ticket prices don't increase, I don't really care as long as it's safe for flying."

"Airfares are already expensive. If we are using locally sourced goods and no longer paying for imports, I would hope the increase in price would be negligible."

"Concerned about if this is suitable for aircraft to be used on a long term basis."

• "Providing it is proven to be safe and more environmentally friendly I would definitely support it."

"Most importantly the performance and assurance that it is safe and reliable and will not decrease the security and safety of a flight."

# Business travellers largely welcome Australia-made SAF, with optimism

## Q15. Please share your comments and views to help us understand how you feel about the introduction of Australia-made Sustainable Aviation fuel.

### Australians who travel for business broadly support the introduction of locally produced Sustainable Aviation Fuel (SAF), highlighting environmental, economic, and national benefits, while also voicing concerns about costs as this segment are flying more frequently.

- **Environmental responsibility and support:** Many business travellers are enthusiastic about SAF's potential to reduce aviation emissions and fight climate change, seeing it as a forward-thinking, necessary initiative.
- **Economic growth and national benefit:** Business travellers see the development of SAF as a way to boost the Australian economy, support domestic industries, and create employment opportunities.
- **Fuel security and domestic independence:** Local production of Sustainable Aviation Fuel (SAF) is seen as crucial for reducing reliance on international sources and protecting Australia against global fuel supply disruptions.
- **Support conditional on reasonable ticket prices:** A number of travellers express support for SAF only if it does not lead to substantial increases in airfare or other costs.
- **Safety and transparency remain top priorities:** Business travellers want more information about SAF's safety, environmental impact, and cost-effectiveness, stressing that quality and health standards must not be compromised
- **Local production sparks optimism and pride:** The local development of SAF is a source of pride for many, who see it as a testament to Australian innovation, resourcefulness, and leadership in sustainability
- **Financial onus on the government to support :** There was a sentiment among business travelers that SAF is a positive step forward for Australia and is important industry initiative that should be supported by the government.



*"It is an important step toward reducing carbon emissions, strengthening energy security, and supporting local industries and jobs."*

*"I believe that sustainably produced aviation fuel in Australia is a fantastic environmental initiative."*

*"The introduction of SAF to Australia will be very great as it will help reduce the climate change issues we all are facing right now."*

*"I think it's a great step towards reducing aviation emissions and supporting local industry."*

*"I believe that it's critical for Australia to create its own SAF industry, primarily to reduce the reliance on International imports and to create a booming, future-proof manufacturing industry in Australia."*

*"It creates employment and reduce reliance on imported SAF."*

*"It is a good economy boost and will create jobs and tax income."*

*"I'm supportive of Australian even if it costs more."*

*"If we are using locally sourced goods and no longer paying for imports, I would hope the increase in price would be negligible."*

*"Support the introduction of Australian-made Sustainable Aviation Fuel as long as it is proven to reduce carbon emissions and doesn't result in an exponential increase to the cost of air travel."*

*"I am supportive of it but not willing to pay more for airfares."*

*"I think sustainable Aviation fuel in Australia is a good idea. It might cost a bit more but the benefits make it worth it."*

*"Making sustainable aviation fuel in Australia feels like a smart step toward cleaner travel and a better future."*

*"I feel inspired and hopeful knowing that Australia is producing Sustainable Aviation Fuel locally."*

*"I believe it's a safer option and helps us generate our own fuel, quite innovative."*

*"I support the introduction of Australia made sustainable aviation fuel as it can reduce emissions, create local jobs, and improve fuel security even if it costs slightly more."*

# Appendix



# Sample profile

		Unweighted %	Weighted %	Sample n=
<b>Which age group do you fall into?</b>	18-24	11%	11%	111
	25-34	18%	18%	182
	35-44	17%	18%	174
	45-54	16%	16%	160
	55-64	15%	15%	152
	65+	22%	22%	223
<b>Do you identify as...</b>	Male	48%	51%	484
	Female	52%	49%	518
<b>STATE</b>	ACT	4%	2%	38
	NT	1%	1%	9
	NSW	30%	32%	301
	VIC	26%	26%	258
	QLD	20%	20%	202
	WA	10%	10%	102
	SA	7%	7%	70
	TAS	2%	2%	22
<b>CITY</b>	Sydney	20%	21%	201
	Elsewhere of NSW	10%	11%	100
	Melbourne	18%	18%	178
	Elsewhere of VIC	8%	8%	80
	Brisbane	9%	9%	95
	Elsewhere of QLD	11%	11%	107
	Perth	8%	8%	79
	Elsewhere of WA	2%	2%	23
	Adelaide	6%	6%	58
	Rest of SA	1%	1%	12
	Tasmania	2%	2%	22
	Darwin	1%	1%	9
	Elsewhere of NT	0%	0%	0
	Canberra / ACT	4%	2%	38
<b>REGION</b>	Metropolitan City	66%	66%	665
	Regional	34%	34%	337
<b>Are you of Aboriginal or Torres Strait Islander origin?</b>	No	92%	91%	917
	Yes, Aboriginal and/or Torres Strait Islander	8%	8%	77
	Prefer not to say	1%	1%	8

		Unweighted %	Weighted %	Sample n=	
<b>Which of the following best describes your current living arrangements?</b>	Living with parent(s)	11%	11%	110	
	Living on my own or with housemates/boarders	18%	19%	184	
	Living with a partner/spouse, never had kids	10%	10%	103	
	Parent/guardian, with youngest child aged under 4 years living with me	8%	8%	85	
	Parent/guardian, with youngest child aged 5-12 years living with me	16%	16%	156	
	Parent/guardian, with youngest child aged 13-18 years living with me	7%	7%	73	
	Parent/guardian, with adult child aged 18 years+ living with me	7%	6%	66	
	Single or couple with all children living out of home	22%	22%	225	
<b>Which of the following best describes your highest level of education? Select one</b>	No formal qualification	0%	0%	1	
	Primary school	0%	0%	5	
	Secondary school – year 9 and below	4%	4%	40	
	Secondary school – years 10 and above	24%	23%	236	
	Certificate	17%	17%	170	
	Diploma/ Advanced Diploma	15%	15%	153	
<b>Which of the following best describes your current working situation?</b>	Bachelor Degree	28%	27%	276	
	Postgraduate Degree or above	12%	12%	121	
	Working full-time	43%	43%	427	
	Working part-time or casual	17%	17%	171	
	Looking for work	2%	2%	19	
	Business owner	3%	3%	27	
	Student studying at university, TAFE, college or other institution	3%	4%	35	
	Full-time parent – intend to return to work or study	1%	1%	15	
	Full-time parent – do not intend to return to work	1%	1%	12	
	Retired	22%	21%	218	
	Unemployed	6%	6%	57	
	Other (please specify)	2%	2%	21	
	<b>How did you vote in the last federal election?</b>	Liberal Party of Australia	23%	23%	226
		Australian Labor Party	42%	42%	419
Australian Greens		9%	9%	91	
Independent Candidate		5%	5%	48	
Pauline Hanson's One Nation Party		11%	12%	114	
Other		2%	2%	17	
I did not vote		5%	5%	54	
Prefer not to say		3%	3%	33	