

MIND THE GAP: A CASE STUDY OF TURKISH AIRLINES ON ALIGNING SUSTAINABILITY INITIATIVES WITH CONSUMER EXPECTATIONS

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ABSTRACT

Purpose- This study investigates the alignment between airline sustainability strategies and passenger perceptions, focusing on the case of Turkish Airlines. It aims to identify the gaps between corporate sustainability messaging, operational realities, and consumer awareness and expectations in the context of an emerging market.

Methodology- A mixed-methods approach was employed, combining an academic literature review with a qualitative field study and a case study analysis. The field research involved structured interviews with 70 passengers at Ankara Esenboğa Airport to gauge awareness of concepts like Sustainable Aviation Fuel (SAF) and carbon offsetting. The case study critically evaluates Turkish Airlines' sustainability reports and strategic initiatives.

Findings- The findings reveal a significant "information gap," with 43% of passengers unaware of key green aviation concepts. While a majority of travelers (71%) express a willingness to pay more for sustainable flights, this support is conditional upon transparency and trust. Passengers exhibit skepticism towards indirect measures like carbon offsetting, preferring tangible actions such as fleet modernization. The analysis of Turkish Airlines indicates that while the airline has a strong, credible strategy in fleet modernization, its initiatives in SAF and carbon offsetting lack scale and are not effectively communicated, creating a "credibility gap".

Conclusion- This paper contributes to the sustainable aviation literature by empirically demonstrating the disconnect between airline strategy and consumer perception in the Turkish context. It highlights that gaining a competitive advantage requires airlines to move beyond symbolic gestures and bridge the credibility gap through transparent communication and measurable, tangible actions.

Keywords: Aviation, green marketing, carbon offsetting, sustainability aviation fuel, aircraft efficiency, consumer awareness

JEL Codes: M16, M31, M37

1. INTRODUCTION

As the world grapples with the escalating climate crisis, the airline industry has become a focal point in discussions surrounding greenhouse gas emissions and environmental responsibility. According to the International Air Council Association (IATA), commercial flights account for 2-3% of global greenhouse gas emissions, a figure expected to rise with the increasing demand for air travel. This has placed the aviation sector under immense pressure to demonstrate a sincere commitment to sustainability, driven not only by international frameworks like the Paris Agreement and the United Nations' Sustainable Development Goals (SDGs), but also by investors, government agencies, and, most importantly, travelers themselves. Consequently, environmental liability is no longer a matter of mere regulatory compliance but has evolved into a fundamental pillar for long-term operational viability, corporate image, and consumer loyalty.

In response, the industry is exploring a diverse portfolio of strategies to mitigate its environmental footprint. These range from enhancing aircraft efficiency and fleet modernization to adopting Sustainable Aviation Fuel (SAF) and implementing carbon offsetting programs. However, despite these efforts, a new challenge has emerged: a significant "gap" between corporate initiatives and public perception. While airlines brand their eco-friendly practices, passengers are often unaware of these complex concepts or remain skeptical of their true impact, creating a fertile ground for "greenwashing" accusations, where marketing claims may not align with substantive action (Peixoto & Rossario, 2024).

This study argues that bridging this "gap" between corporate strategy and consumer expectations is a critical challenge for the future of sustainable aviation. This paper investigates this dynamic through a case study of Turkish Airlines. As a carrier with one of the most extensive international networks, serving more countries than any other airline worldwide (OAG, 2024), Turkish

Airlines is under particular scrutiny to integrate a robust and transparent environmental strategy into its expansive operations. Consequently, this research seeks to answer the following questions:

1. What is the primary sustainability strategies implemented and communicated by Turkish Airlines?
2. What are the levels of awareness and perception among passengers regarding these green initiatives?
3. Where do the key gaps lie between Turkish Airlines' sustainability efforts and the expectations of its consumers?

To address these questions, this paper will first review the existing literature on sustainable aviation, covering key topics such as SAF, carbon offsets, green branding, and customer perspectives. It will then outline the mixed-methods approach used for the research. Subsequently, the findings from the case study and the passenger field study at Ankara Esenboğa Airport are presented. Finally, the paper will discuss the implications of these findings, highlighting the critical role of transparency in aligning sustainability initiatives with consumer expectations to build a credible and competitive green brand.

2. LITERATURE REVIEW

2.1. Decarbonization Strategies in Aviation: Promises and Pitfalls

The airline industry's response to the climate imperative rests on a portfolio of decarbonization strategies, dominated by two principal yet profoundly different approaches: market-based carbon offsetting and technology-driven Sustainable Aviation Fuel (SAF). Carbon offsetting programs are a widely used tool, enabling airlines to compensate for their operational emissions by funding external environmental projects such as reforestation or green power tasks (Baxter, 2021). However, while positioned as a practical tool for immediate emissions counteraction, the efficacy and legitimacy of these schemes are intensely debated within the literature. A primary criticism is that offsets often function as a "greenwashing" mechanism, providing a veneer of climate action without fostering genuine reductions in the airline's own operational emissions (Baxter, 2023; Peixoto & Rossario, 2024). This critical perspective is underscored by findings that such programs should be viewed as a supplementary measure rather than a substitute for direct decarbonization efforts (Wong et al., 2024).

In contrast to the credibility challenges of offsetting, Sustainable Aviation Fuel (SAF) is broadly regarded as the most critical technological pathway for achieving significant and direct emission reductions in the aviation sector (Szyk & Lenort, 2024). Produced from non-conventional feedstocks, SAF can be blended with traditional jet fuel and has the potential to drastically lower an aircraft's carbon footprint over its lifecycle (Chao et al., 2019). Despite this promise, its widespread adoption is severely hampered by significant practical and economic hurdles. The primary barriers include prohibitively high production costs—often two to six times those of conventional fuel—and a global production capacity that remains critically insufficient to meet industry demand (Shahriar & Khanal, 2022). The high cost of SAF also presents a strategic dilemma for airlines, as its adoption can significantly impact operational expenses, ticket prices, and overall market competitiveness (Casals, 2023; Karanki, 2024).

2.2. The Passenger Factor: Green Expectations vs. Market Reality

The transition to sustainable aviation is not merely a technological or financial challenge; it is deeply intertwined with consumer behavior and perception. A growing body of literature indicates that passengers are becoming significantly more environmentally conscious, creating pressure on airlines to not only adopt green initiatives but to also effectively communicate these efforts (Han, 2020). Studies consistently find a positive correlation between passengers' environmental concerns and their willingness to choose and recommend eco-friendly airlines (Han et al., 2019; Korba et al., 2023). This desire to support sustainable carriers is often linked to passengers' personal values and their belief in the genuine effectiveness of an airline's green programs (Zungur et al., 2024). When customers perceive that an airline is sincerely committed to environmental protection, they are more likely to express satisfaction and exhibit positive citizenship behaviors (Baumeister et al., 2022; Hwang & Lyu, 2020).

However, this positive inclination is fragile and highly conditional, often clashing with market reality. The most significant barrier undermining passenger trust is the pervasive risk of "greenwashing," where companies are perceived to be exaggerating their sustainability claims for marketing purposes rather than implementing substantive changes (Peixoto & Rossario, 2024). This skepticism demands a high degree of transparency and authenticity from airlines (Mayer et al., n.d.). For passengers to translate their passive concern into active support—such as paying a premium or participating in an offset program—they require clear, credible evidence that these initiatives are impactful. Trust, therefore, emerges as a critical mediator; green practices can cultivate consumer trust, which in turn fosters positive customer behaviors that benefit the airline in the long run (Han et al., 2021). Nevertheless, the way passengers understand and shift their reaction to the sustainability claims of airlines depends greatly on the regional and societal aspects of the institutions. A study that compares areas of the Middle East depicts traveler engagement with green initiatives as largely dependent on local policy support, national energy profiles, and the prominence of carrier-led programs which are the factors that can either establish or weaken the public trust in the environmental message (Bahman & Shaker, 2022).

Although, the geopolitics of turning to alternatives and their supply chains is affecting the perception of the feasibility of commitments made by airlines, if the production of SAF and policy incentives seem limited by trade and energy dynamics, consumers are more likely to consider the ambitious pledges as distant rather than immediately actionable (Baledon et al., 2022).

These insights imply that passenger skepticism in emerging markets often reflects not only doubts about marketing authenticity but also realistic judgments about what airlines can deliver under prevailing market and policy constraints. Thereupon, effective communication, tailored to different market segments and designed with behavioral "nudges" during the booking process, is essential to bridge the gap between passive green sentiment and active passenger participation (Stüben & Cantoni, 2024).

2.3. Branding, Reporting, and Operational Innovations in Sustainable Aviation

Another major facet of the study emphasizes the significance of corporate communication, branding, and operational reporting in the creation of airline sustainability strategies that are reliable by the public. In fact, many airline cases demonstrate the carriers are often talking about the green initiatives as a highlight of their marketing identity; they are nevertheless highly different in terms of the very essence and accessibility of the communication (Chen et al 2016) and (Koc, 2023). In terms of content, the corporate reports published by Emirates (2023) and Turkish Airlines (2024), set out the major climate plans, yet their technical nature can limit passenger engagement. Correspondingly, the case of Lufthansa's Companied platform illustrates an example of how honest digital instruments can raise customer confidence by connecting offset contributions to the particular SAF projects (Lufthansa Group, 2022). Moreover, beyond the issue of communication, as the operational sector comes up with the concept of small hybrid electric and conventional engines aircraft (Romano et al., 2020) and the strategic use of networks (OAG, 2024; Dichter et al., 2020) for the transition to sustainable flight, it becomes evident that it also relies on infrastructural and market-level strategies, not merely on fuels and offsetting. These perceptive indicate that the proper matching of sustainability goals by airlines would mean the incorporation of not only the technical aspects of carbon elimination but also a reliable reporting system, clear communication, and operational innovation.

2.4. Identifying the Research Gap

The existing literature provides a clear picture of the dual challenges in sustainable aviation. On one hand, the primary decarbonization strategies available to airlines, such as carbon offsetting and SAF, are fraught with their own significant issues of credibility, cost, and scalability. On the other hand, while there is a clear rise in passengers' environmental consciousness, their support is conditional, often hampered by a lack of trust and skepticism towards corporate green claims. While these two streams of research—corporate strategy and general consumer sentiment—are well-documented, they often run in parallel. There is a notable gap in empirical research that directly connects the specific sustainability portfolio of a major international airline with the real-world awareness, perceptions, and expectations of its own passenger base. Most studies focus on general consumer intentions rather than measuring the specific "gap" in a live operational context, particularly within a key emerging market like Turkey.

Furthermore, traditional studies mostly overlook the subtle manner in which culture, economy, and regulations affect consumers' reactions to airlines' sustainability initiatives. To grasp these factors is essential, since how passengers perceive brands can be a key factor for the loyalty of the brand, purchase choices, as well as the overall success of eco-friendly strategies. In addition, even though the technical part of emissions reduction is mostly the centerpiece of corporate reporting, the question of whether these efforts are actually noticed or even if customers resonate with them is rarely addressed. This study aims to fill this research gap by providing a detailed case study of Turkish Airlines, empirically investigating the alignment—and misalignment—between its strategic initiatives and the expectations of its customers in order to serve as a bridge between the corporate strategy and the passenger's perception, which is a more customer-centric approach to consistent and sustainable aviation decisions.

3. METHODOLOGY

This study employs mixed-methods research design to provide a holistic understanding of the research problem. The approach integrates a qualitative analysis of secondary data, including a case study of Turkish Airlines, with a quantitative field survey of passengers. This triangulation of data sources allows for a more robust and nuanced analysis of the gap between airline strategy and consumer expectations.

Data collection involved two primary streams. First, an extensive review of secondary data was conducted, encompassing academic literature, industry reports, and key corporate documents such as the Turkish Airlines Climate Change Plan Report (2024). Turkish Airlines was selected as the case study subject due to its significant global presence and strategic importance in the aviation industry (OAG, 2024). Second, to gather primary data on passenger perspectives, a field study was conducted at Ankara Esenboğa Airport, chosen for its diverse profile of domestic and international travelers. Using a convenience sampling method, a group of 70 passengers traveling for both business and leisure were recruited for voluntary and anonymous in-person, structured interviews.

The survey instrument was a questionnaire designed to probe awareness and attitudes on key environmental topics. It included three central questions to assess: (1) passenger awareness of concepts like Sustainable Aviation Fuel (SAF) and carbon offsetting; (2) their willingness to pay more for verifiably sustainable airlines; and (3) their perception of the effectiveness of such initiatives compared to direct emission reduction measures. Following data collection, quantitative responses from the survey were analyzed using descriptive statistics (frequency analysis) to summarize passenger attitudes. Qualitative data from the document analysis and open-ended responses were synthesized using thematic content analysis to identify key strategies and perceptions. Demographics of respondents: Of the 70 participants, 54% were male and 46% female. Age distribution was

as follows: 18–30 years (38%), 31–50 years (42%), and above 50 years (20%). Nationalities included 60% Turkish citizens and 40% international travelers. Travel purpose varied, with 35% identifying as business travelers and 65% as leisure travelers. These demographics provide a balanced profile of passengers and contextualize the survey findings

4. FINDINGS AND ANALYSIS

This section presents the findings from both the passenger field study and the case study of Turkish Airlines, followed by an integrated analysis that evaluates the airline's strategy in the context of consumer perceptions.

4.1. Key Findings from the Passenger Field Study

The field study provided critical insights into the passenger perspective. Firstly, a significant information gap was identified; 43% of passengers were unaware of core sustainability concepts like SAF and carbon offsetting, suggesting that industry-level discourse is not effectively reaching the public. Secondly, despite this lack of awareness, a high willingness to engage was observed, as 71% of respondents stated they would pay more for a sustainable airline. However, this support was explicitly conditional upon transparency and verifiable proof that extra funds lead to real environmental improvements, not just marketing campaigns. The 29% who were unwilling to pay more cited financial constraints and a belief that environmental costs should be borne by industry. Lastly, a prevailing **skepticism** was noted, as 57% of passengers expressed a preference for direct, tangible actions over indirect measures. For this group, investments in new-generation fleets and optimizing flight routes are perceived as more concrete and credible than abstract concepts like carbon offsetting. These key findings are summarized in Table 1.

Table 1: Summary of Passenger Survey Responses

Survey Question	Response Summary
Awareness of green aviation (SAF, offsets, tech)	43% unaware, 29% aware of offsetting, 29% aware of SAF/tech
Willingness to pay more for sustainable airlines	71% yes (conditional on trust and transparency), 29% no
Belief in effectiveness of green initiatives	43% say yes, 57% are skeptical and prefer direct emission cuts

4.2. Evaluation of Turkish Airlines' Sustainability Strategy

An analysis of Turkish Airlines' initiatives reveals a multi-pronged strategy that combines technological investment with market-based mechanisms. The core components of this strategy are summarized in the descriptive version of Table 2 and detailed below.

Table 2: Turkish Airlines' Sustainability Strategy by Category

Strategy Area	Key Actions by THY
Fleet Modernization	Airbus A350, Boeing 787, lighter containers
Carbon Offsetting	Voluntary offset via CHOOOSE™, limited visibility
SAF Usage	Demonstration flights to Paris/Oslo, Tüpraş partnership
ESG & Ground Initiatives	Plastic reduction, recycling, ground vehicle electrification
Communication Strategy	Dashboards, infographics, offset tools

4.2.1. Fleet Modernization: A Credible Foundation

The modernization of the fleet represents the most significant and credible pillar of Turkish Airlines' environmental strategy. The airline's substantial investment in new-generation, fuel-efficient aircraft like the Airbus A350 and Boeing 787 provides a tangible and measurable basis for its sustainability claims (Turkish Airlines, 2024). This strategy extends beyond simple acquisition to include operational efficiencies such as decommissioning older aircraft and reducing onboard weight through optimized catering and maintenance routines. This strategic focus on tangible assets directly aligns with the strong passenger preference for direct emission reduction measures identified in the field study. This alignment suggests that the airline's fleet is its most powerful, yet perhaps under-communicated, tool for building consumer trust.

4.2.2. Carbon Offsetting: A Strategy with a Visibility Problem

Turkish Airlines offers passengers a voluntary carbon offsetting program, partnering with credible third-party organizations like CHOOOSE™ to lend legitimacy to the initiative (Turkish Airlines, 2024). This approach is designed to empower passengers by giving them a sense of personal responsibility. However, the program's effectiveness appears to be hampered by a significant visibility problem. The specific projects funded by the offsets are not clearly communicated, creating an opaque system that prevents deeper passenger engagement and trust. This lack of transparency and clarity likely contributes directly to the low passenger awareness of offsetting programs and reinforces the general skepticism towards such indirect measures observed in our field study.

4.2.3. Sustainable Aviation Fuel (SAF): A Hopeful but Distant Commitment

The airline's engagement with SAF is strategically important but currently appears more symbolic than scalable, representing a long-term aspiration rather than a large-scale operational reality. Demonstration flights using biofuel blends are positive signals of intent (Turkish Airlines, 2024), but the actual volume of SAF used is negligible. This symbolic usage is constrained by significant real-world challenges, including prohibitively high production costs and extremely limited global availability (Shahriar & Khanal, 2022). Furthermore, the geographical concentration of SAF production in Europe and North America presents additional logistical and financial hurdles for a carrier based in Türkiye. This reality, coupled with very low passenger awareness of SAF, means the initiative currently has a limited impact on consumer perception and does little to bridge the airline's credibility gap.

5. DISCUSSION

5.1. The Information Gap in Practice: Connecting Low Awareness with High Expectations

The findings from the field study empirically confirm the existence of a significant "information gap" between airlines and their consumers, a theme consistently highlighted in the literature. Our survey revealed that a substantial portion of passengers (43%) at Ankara Esenboğa Airport were unaware of fundamental green aviation concepts like SAF and carbon offsetting. This finding gives tangible, local context to previous research which identified that passengers often lack knowledge of specific green initiatives (Korba et al., 2023). The presence of this information gap suggests that despite airlines' efforts to brand themselves as sustainable, the core messages are not effectively reaching the traveling public. This disconnect is critical because, as the literature suggests, environmental knowledge is a key precursor to pro-environmental consumer behavior (Han, 2020). Therefore, the high willingness to support sustainable airlines (71%), juxtaposed with low awareness, indicates a missed opportunity for airlines like Turkish Airlines to engage a receptive but uninformed customer base.

5.2. The Credibility Gap: Passenger Skepticism and the Preference for Tangible Action

Beyond a lack of information, our findings point to a deeper "credibility gap," particularly concerning indirect sustainability measures. The survey showed a clear passenger preference for direct, tangible actions, with 57% expressing skepticism towards initiatives like offsetting and instead favoring investments in new, fuel-efficient aircraft. This sentiment aligns perfectly with the academic critique of carbon offsetting programs, which are often questioned due to their lack of transparency and potential for "greenwashing" (Baxter, 2023; Peixoto & Rossario, 2024). Interestingly, this passenger preference for tangible assets directly corresponds to the core strength of Turkish Airlines' sustainability strategy: its significant and ongoing investment in a modern fleet (Turkish Airlines, 2024). This represents the airline's most credible and defensible green initiative. However, the airline's less visible and more abstract offsetting program aligns with the very source of passenger skepticism. This suggests that while Turkish Airlines possesses a powerful tool for building trust (its modern fleet), its communication may not be effectively leveraging this asset to address the credibility gap identified in both the literature and our field study.

5.3. Strategic Implications and Recommendations

The convergence of our findings from the field study, case study, and literature review provides clear strategic implications for Turkish Airlines and the wider industry. The conditional nature of passenger support—where 71% of travelers are willing to pay more only if initiatives are transparent and credible—places the burden of proof squarely on the airline. While Turkish Airlines' fleet modernization is a strong foundation, it lags behind global competitors in other key areas of transparent engagement. For instance, as summarized in Table 3, carriers like Lufthansa have developed consumer-facing platforms that provide detailed tracking and options for directly funding SAF, enhancing both transparency and passenger involvement (Lufthansa Group, 2022).

Table 3: Comparative Analysis of Airline Sustainability Initiatives

Airline	SAF Usage	Carbon Offsetting	Fleet Modernization	Public Transparency
Turkish Airlines	Symbolic, no volume targets	Available via booking (CHOOOSE™), low awareness	Active (A350, 787, etc.)	Moderate – lacks real-time tools
Lufthansa	5% SAF by 2030 (public target)	fully transparent	High	Very high (dashboards, tracking)
Emirates	SAF demo flight 2023, R&D focus	Not consumer-facing yet	Strong (777, A380 upgrades)	Moderate

To effectively "close the gap," Turkish Airlines should re-align its communication strategy to match its operational strengths and address passenger expectations. This study suggests the following recommendations:

Leverage Tangible Assets: The airline should more actively and visibly market its fleet modernization as its primary sustainability achievement, as this directly answers passenger preference for tangible, direct-impact measures.

Enhance Transparency: The current "black box" approach to the voluntary offsetting program should be replaced with a more transparent model that clearly communicates project details, verification standards, and impact metrics, thereby addressing the

core of passenger skepticism.

Move Beyond Symbolic SAF Usage: To build long-term credibility, the airline should set public, measurable, and ambitious targets for increasing its use of SAF, moving from symbolic demonstration flights to a clear strategic commitment, a practice already adopted by some competitors.

Make Hidden Progress Visible: The airline should develop communication strategies to make its "hidden" operational efficiencies, such as weight reduction and optimized flight planning, more visible and understandable to passengers. This would showcase a comprehensive commitment to sustainability beyond symbolic actions and build further trust.

By implementing these measures, Turkish Airlines can better align its sustainability initiatives with consumer expectations, bridge the credibility gap, and capitalize on the significant passenger goodwill identified in this research.

6. CONCLUSION

This study investigated the critical gap between airline sustainability strategies and passenger perceptions, using a mixed-methods case study of Turkish Airlines. The research has demonstrated that while the aviation industry is under immense pressure to adopt green practices, a significant disconnect exists between corporate actions and consumer awareness, trust, and expectations. Our findings empirically confirmed an "information gap," with a large portion of travelers being unaware of core sustainability concepts, and a deeper "credibility gap," where passengers exhibit skepticism towards indirect measures like carbon offsetting and show a clear preference for tangible, verifiable actions such as fleet modernization.

The primary contribution of this research is the empirical demonstration of this strategy-perception gap in the context of a major global carrier in an emerging market. By triangulating data from a field study, a case study, and the existing literature, this paper moves beyond general theories of consumer sentiment to highlight the specific points of friction and alignment for Turkish Airlines. For practitioners, this study provides actionable, evidence-based recommendations. It argues that to build a credible green brand, airlines must align their communication strategies with their most tangible operational strengths. For Turkish Airlines, this means more actively leveraging its modern, fuel-efficient fleet—a measure both credible in the literature and preferred by its passengers—while enhancing the transparency of its offsetting programs and setting ambitious, public targets for SAF adoption to move beyond symbolic gestures.

This study is not without its limitations. The findings from the passenger survey are based on a convenience sample of 70 individuals at a single airport, which may limit the generalizability of the results. Future research could build upon this study by employing larger, more diverse samples across multiple airports and countries to quantitatively validate these findings. Furthermore, longitudinal studies tracking how passenger perceptions evolve in response to new airline initiatives and regulations would provide valuable insights. Comparative case studies of different airline models, such as low-cost versus legacy carriers, could also offer a broader understanding of how business strategy impacts sustainability communication and perception.

In conclusion, the journey towards sustainable aviation is as much a challenge of communication and trust-building as it is of technological and operational change. Airlines that succeed in authentically aligning their concrete actions with transparent communication will not only gain a competitive advantage in an increasingly eco-conscious market but will also make a more meaningful contribution to the global effort to decarbonize the skies.

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