



# Airlines

## Driving forces

To capitalize on ongoing industry changes, airlines need to remain future-oriented. As the lines between full-service and low-cost airlines continue to move, companies must better understand their customers and be prepared to adapt their service offerings. Digitalization will play an important role in delivering an enhanced customer experience. Passenger safety is a critical issue and demands transparency to prevent reputational risks in the aftermath of operational incidents. Labor practices remain important considering the highly unionized workforce and the latent risk of strikes, which result in revenue reduction and operational disruptions. On the environmental front, operational eco-efficiency drives profitability, and the adoption of newest generation of more efficient aircraft leads to greater differentiation between companies.

## Highlighted criteria & Dimension weight

- Economic Dimension ..... 43%
  - Risk & Crisis Management
  - Efficiency
  - Fleet Management
- Environmental Dimension ..... 23%
  - Operational Eco-Efficiency
  - Climate Strategy
  - Environmental Policy & Management Systems
- Social Dimension ..... 34%
  - Passenger Safety
  - Labor Practice Indicators
  - Talent Attraction & Retention

## Sustainability leaders 2019

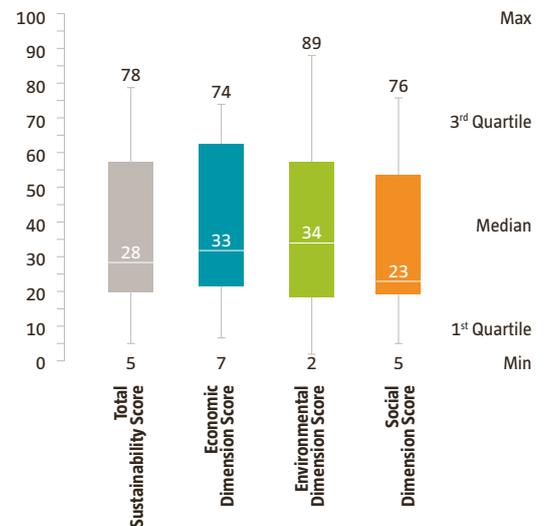
|  |        |
|--|--------|
| <b>SAM Gold Class</b>                  | ●      |
| ANA Holdings Inc                       | Japan  |
| <b>SAM Bronze Class</b>                | ●      |
| Air France-KLM                         | France |
| China Airlines Ltd *                   | Taiwan |
| <b>Sustainability Yearbook Members</b> | ●      |
| Latam Airlines Group SA                | Chile  |

\* SAM Industry Mover

## Industry statistics

|   |     |
|---|-----|
| Number of companies in universe                   | 31  |
| Number of companies assessed in 2018              | 23  |
| Assessed companies to total companies in universe | 74% |
| Market of assessed companies to total market      | 87% |

## Results at industry level



The box-and-whisker plot describes the distribution of scores in the industry, based on all assessed companies. More information is available in the Reading Instructions in the introduction.