# Aviation Index 2025

Public perceptions and priorities

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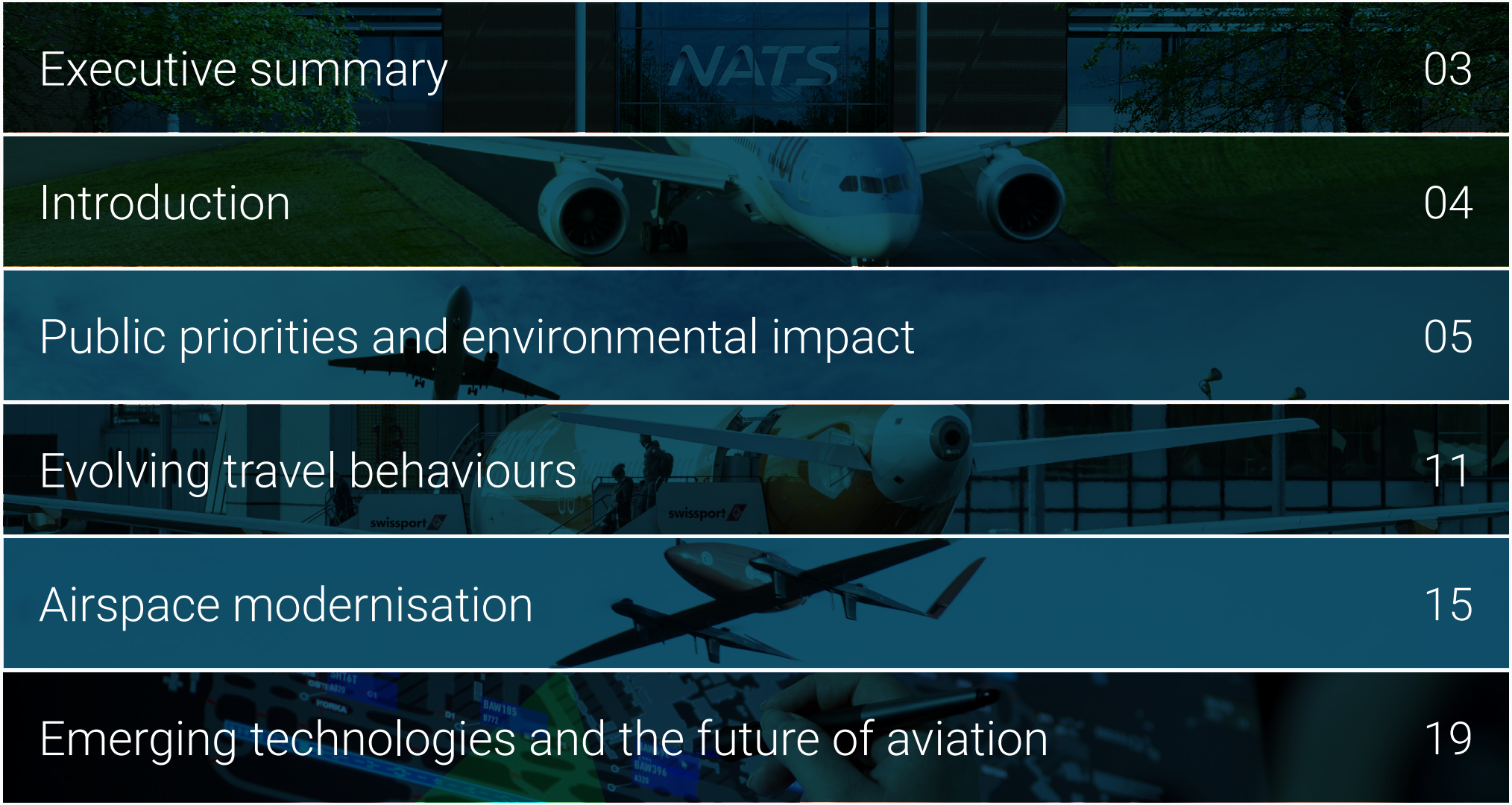

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# Executive summary

The 2025 edition of the NATS Aviation Index reveals a UK public that is broadly positive about aviation but increasingly focused on tangible performance improvements. While environmental concerns are a strong theme, punctuality is the leading issue the public want the aviation industry to address.

Travel habits have stabilised. Just over half (52%) of respondents reported flying internationally in the past 12 months, while 32% flew domestically. Looking ahead, 26% expect to fly more often in the next 12 months, particularly among younger people and ethnic minorities. However, cost remains the dominant influence on travel decisions, with 89% saying it plays an important role in whether or not they choose to fly.

Environmental concerns remain a top priority in the eighth year of the survey, but expectations around how the industry should respond, and which actions to prioritise, appear to be changing. While 56% believe reducing emissions should be a key focus, an even greater share (63%) cites on-time performance as their top priority. The public still places primary responsibility for reducing aviation's environmental impact on government (30%), followed by airlines (26%) and industry bodies such as NATS and the CAA (23%). Only 4% believe individual passengers are most responsible.

Although around a third of respondents (33%) say they are willing to avoid domestic flights or use public transport to and from airports in the UK, an equal number admit to taking no personal action to reduce aviation's environmental impact. This highlights an ongoing gap between climate awareness and individual behaviour change.

Awareness of airspace modernisation in the UK is growing, with recognition of efforts to update the UK's 'invisible infrastructure' rising to 19%, up from 11% in 2024. More than half of the public (52%) now support changing flight paths to enable more efficient use of airspace. Support for airport expansion remains (53%), but the majority (69%) agree that airspace upgrades are a prerequisite for any meaningful growth in capacity.

Looking to the future, public openness to emerging technologies is growing. Support for flying taxis has increased significantly—from 34% in 2024 to 40% in 2025—despite some continuing concerns around safety and cost. Drone use for public services is widely accepted, particularly for emergency response (86%) and infrastructure inspection (81%).

Artificial Intelligence (AI) in transport and travel is viewed with cautious optimism. While nearly half (49%) express concern about public safety, 68% support AI being used for baggage screening, and 50% approve of its use in air traffic and route management. These findings indicate a willingness to embrace innovation—provided it is seen to enhance safety and support, not replace, human oversight.

Together, these insights highlight the importance the public places on aviation's economic, social, and personal benefits, while also revealing growing expectations for innovation and stronger environmental responsibility. As the industry looks to the future, aligning with public priorities will be essential to building trust and ensuring long-term resilience.

# Introduction

The aviation sector is a cornerstone of the UK's economy and global connectivity, yet it faces mounting pressure to balance growth with environmental responsibility and public trust. As air travel rebounds in the post-pandemic era and technological innovation reshapes the industry, public expectations are shifting.

Concerns around carbon emissions, noise pollution, and flight delays are intensifying, while the demand for modern, efficient, and sustainable airspace management grows more urgent. In this evolving landscape, a clear understanding of public perception is essential to guide industry strategy, inform policy development, and shape effective communication.

Since 2018, NATS has commissioned Ipsos UK to conduct annual research into public perceptions of the aviation sector through the Aviation Index. This long-running study provides valuable insights into attitudes around air travel, industry priorities, and emerging technologies. The 2025 edition continues this tradition, offering an evidence-based understanding of how the UK public views the role and responsibilities of aviation in today's social, environmental, and technological landscape.

## Objectives

The Aviation Index 2025 was designed to meet the following objectives:

Understand how often and why people are flying, both domestically and internationally, and assess their expectations for future travel.

Explore how the public perceives aviation's contribution to climate change, and the extent to which they believe the industry is addressing this challenge.

Understand public awareness of and support for changes to the UK's airspace infrastructure, particularly in relation to airport expansion and system efficiency.

Evaluate public openness to innovations in advanced air mobility (AAM) such as drones and flying taxis and assess perceived risks and benefits.

Examine comfort levels with Artificial Intelligence (AI) applications in aviation and customer experience and identify perceived advantages and concerns.

## Scope

This year's survey maintains continuity with previous waves by repeating key questions from earlier editions (2018–2024), allowing for meaningful trend analysis. It also introduces new topics for 2025, including the public's understanding and acceptance of artificial intelligence in transport.

## Methodology

The research was carried out by Ipsos UK using its online panel. Fieldwork took place from 9–10 April 2025, with responses gathered from 1,217 UK adults aged 18 and over. Quotas were set for age, gender, ethnicity, and UK region, with data subsequently weighted to reflect the demographic profile of the UK population. The findings presented are statistically robust and representative at a national level. Statistically significant year-on-year changes are indicated where relevant throughout the report.

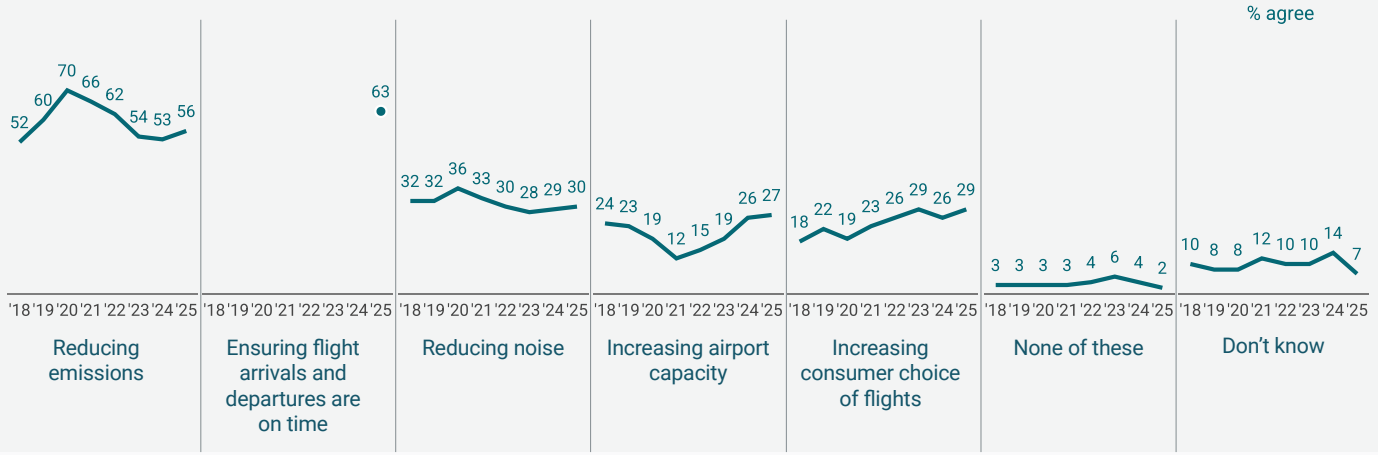
# Public priorities and environmental impact

# Public priorities and environmental impact

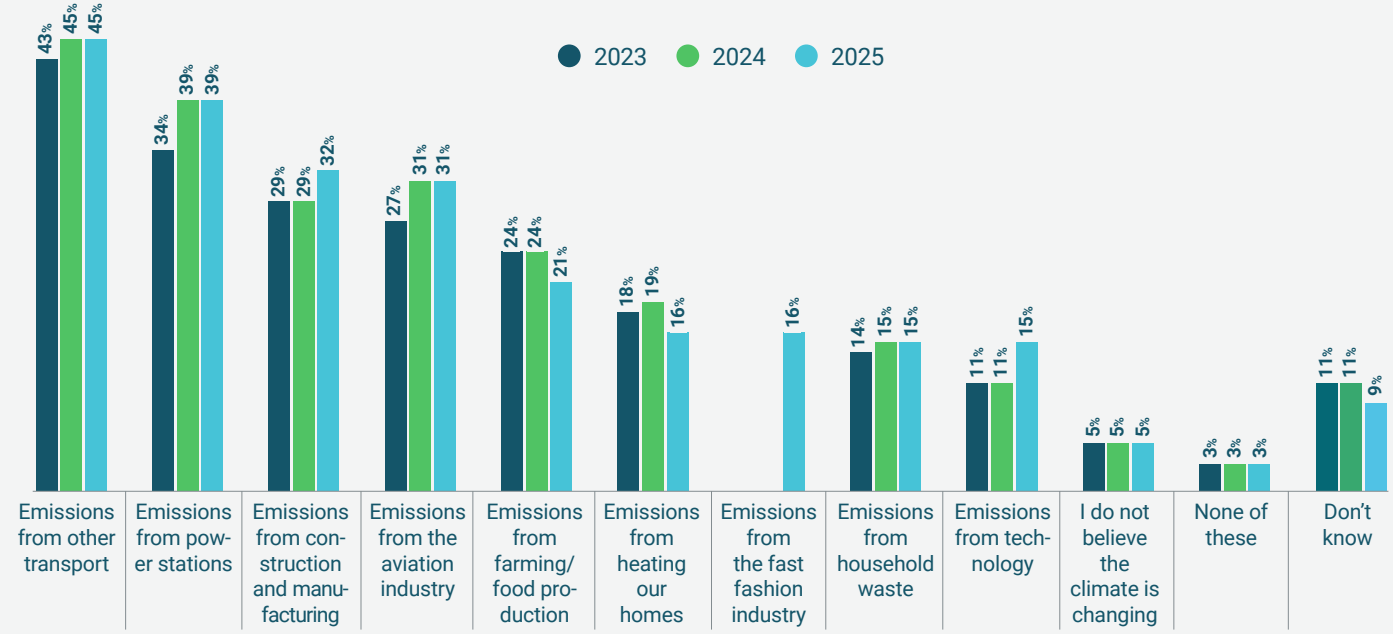
The 2025 Aviation Index reveals a notable shift in public expectations of the aviation sector. For the first time, respondents were asked to rate the importance of ensuring flight arrivals and departures are on time—and it immediately emerged as the top priority, selected by 63% of participants. This placed it ahead of emission reduction, which 56% identified as a key area for improvement up from 53% in 2024, but it is still a significant decrease compared with 2022 (62%) and 2020 (70%).

While the environment remains a major public concern, and aviation emissions are perceived as a significant contributor to climate change—ranked just behind other transport modes and power stations—there is a growing emphasis on practical, day-to-day service improvements, such as flight punctuality, which are now seen as top priorities by many travellers.

**Q.** Thinking about what the airports, airlines and organisations responsible for regulation of aviation should focus on, which, if any, of the following aspects do you think should be most prioritised for improvement?

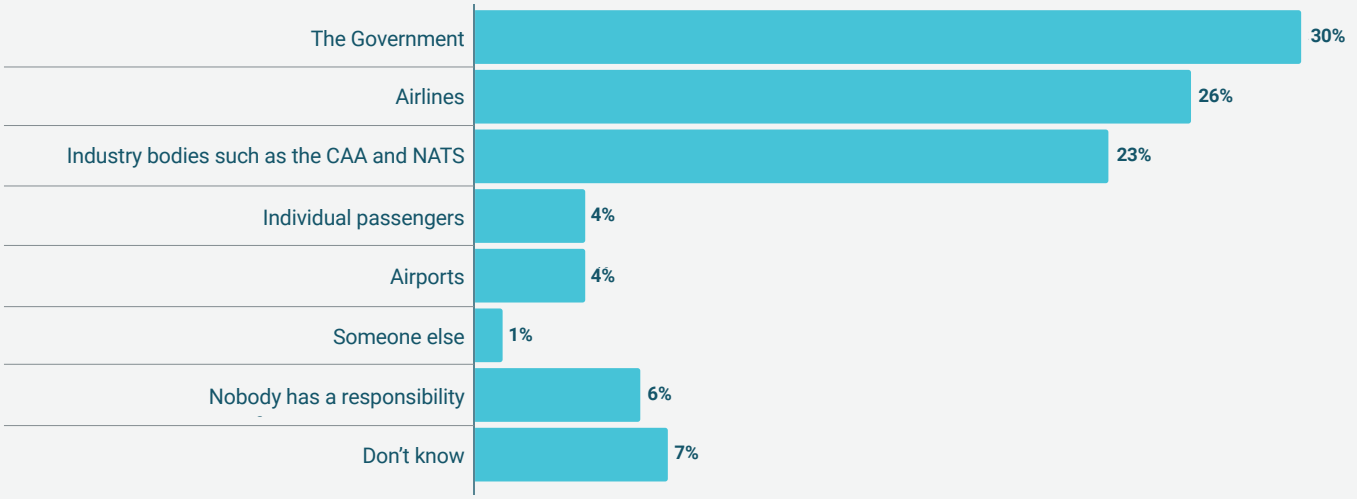



**Q.** Which of the following, if any, do you think are the three main causes of climate change?

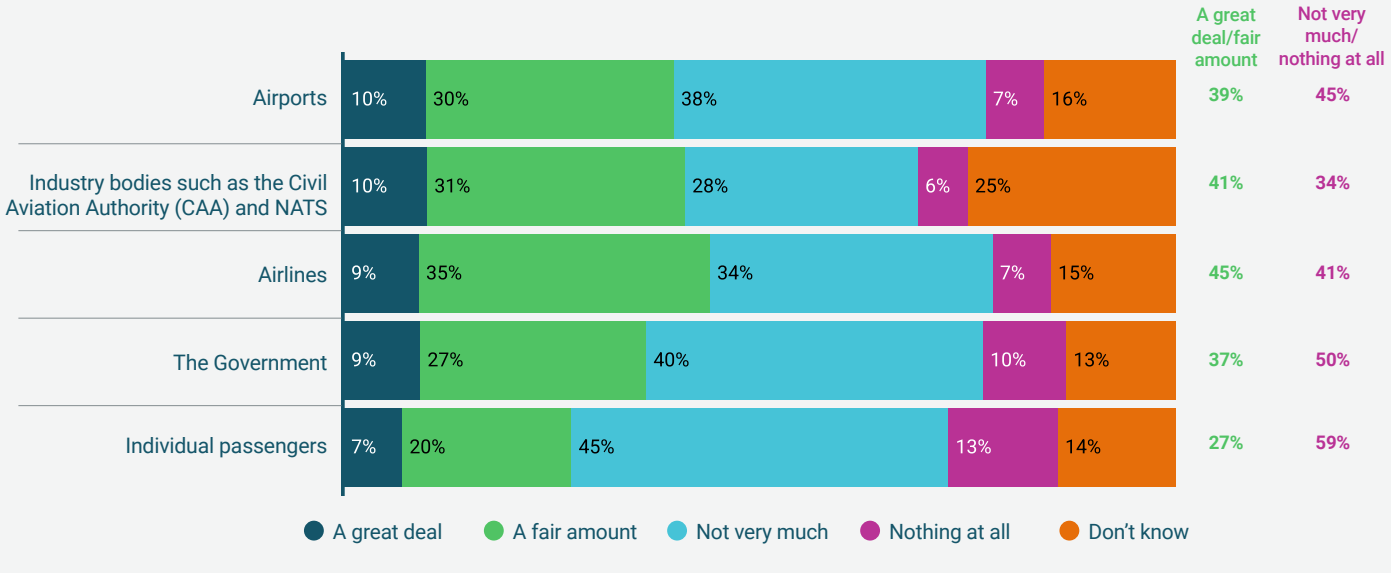


The change is a signal of the public's growing impatience with perceived service inefficiencies, reflecting perhaps a more pragmatic expectation of what the industry should deliver in the short term. It does not, however, suggest that environmental concerns have faded. The public still expects meaningful action on climate impact, particularly from organisations: 30% place the primary responsibility for reducing aviation's environmental footprint on the UK Government, followed by 26% who cite airlines. Industry bodies such as the CAA and NATS are next, while only 4% believe the burden should fall on individual passengers.

**Q.** Who, if anyone, do you believe should take most responsibility for reducing the environmental impact of flights in the UK?



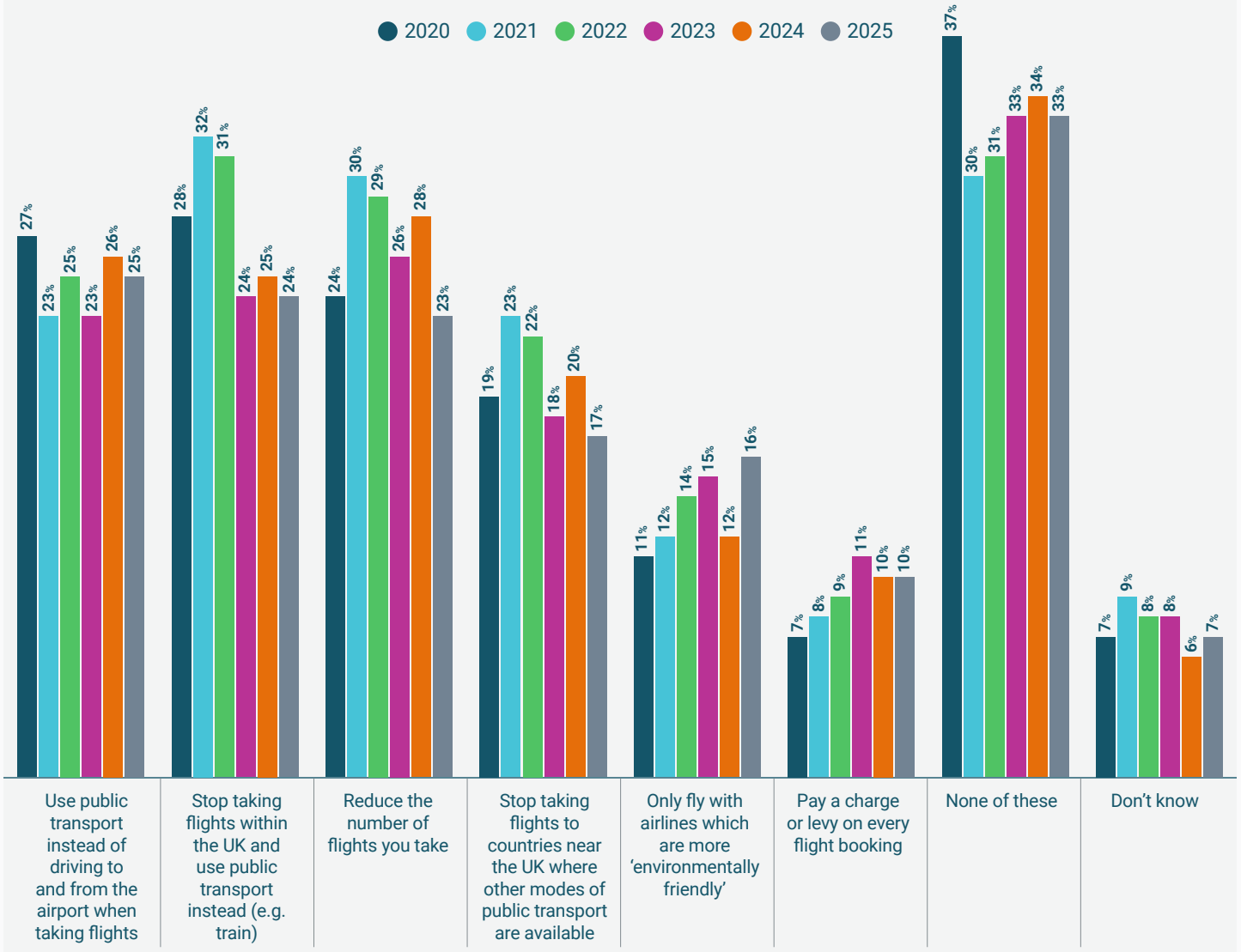

**Q.** And how much, if anything, do you believe each of the following is currently doing to reduce the environmental impact of flights in the UK?



Policy interventions to reduce emissions continue to receive moderate support. At the same time, behavioural intentions remain relatively strong: one in three respondents say they are willing to avoid domestic flights or opt for public transport when travelling to and from airports.

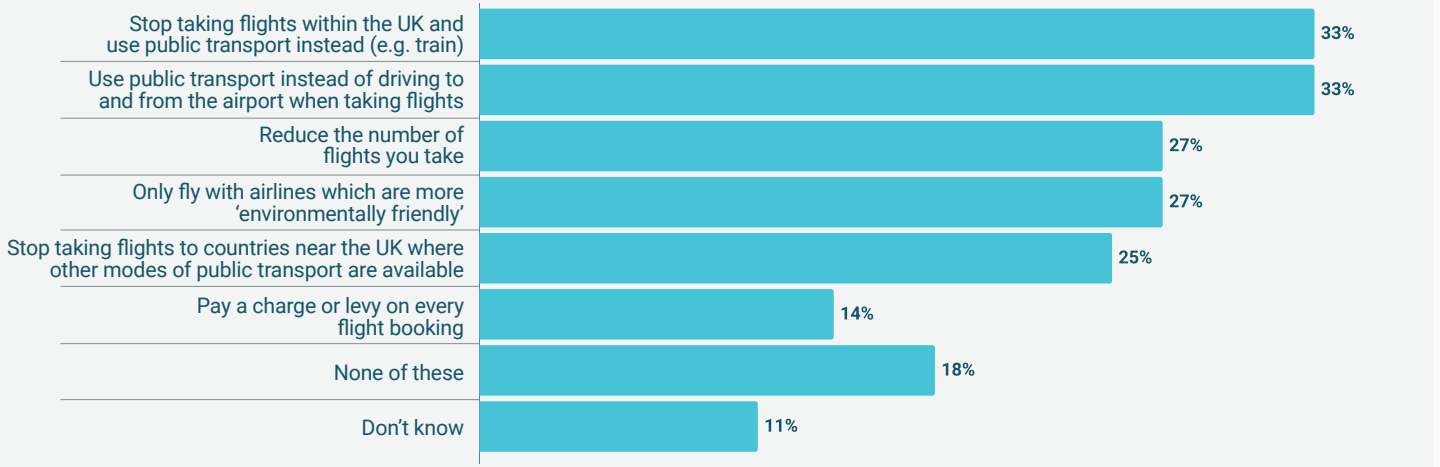
However, a gap remains between environmental concern and individual action. Although awareness of aviation's impact on the environment is high, 33% of respondents did not report taking any of the listed actions to reduce their flying-related emissions. This disconnect suggests that while the public supports systemic change, particularly where it improves service reliability and sustainability, individuals' behavioural change continues to lag behind expressed environmental values.

Q. Which, if any, of the following are you personally already doing to help reduce the environmental impact of flights in the UK?



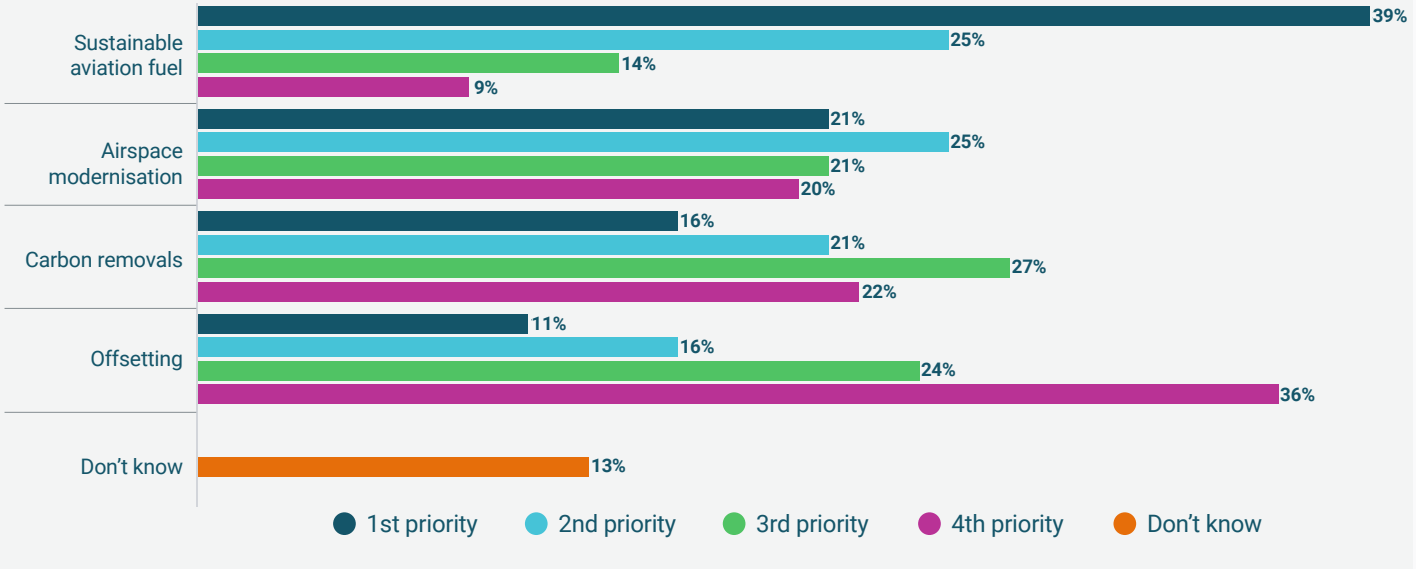
Those who have flown commercially within the UK in the last 12 months were more likely than those who have never flown in the UK to say they are willing to use public transport instead of driving to/from airports or only fly with airlines that are more 'environmentally friendly' and pay a charge/levy on every flight booking.

**Q.** Which, if any, of the following would you personally be prepared to do, or do more of to help reduce the environmental impact of flights in the UK?




When asked to prioritise strategies for reducing aviation emissions, the UK public ranked Sustainable Aviation Fuel (SAF) as the top choice—ahead of airspace modernisation, and well above carbon removals and offsetting. This reflects growing recognition of SAF as a practical, scalable alternative to conventional jet fuel.

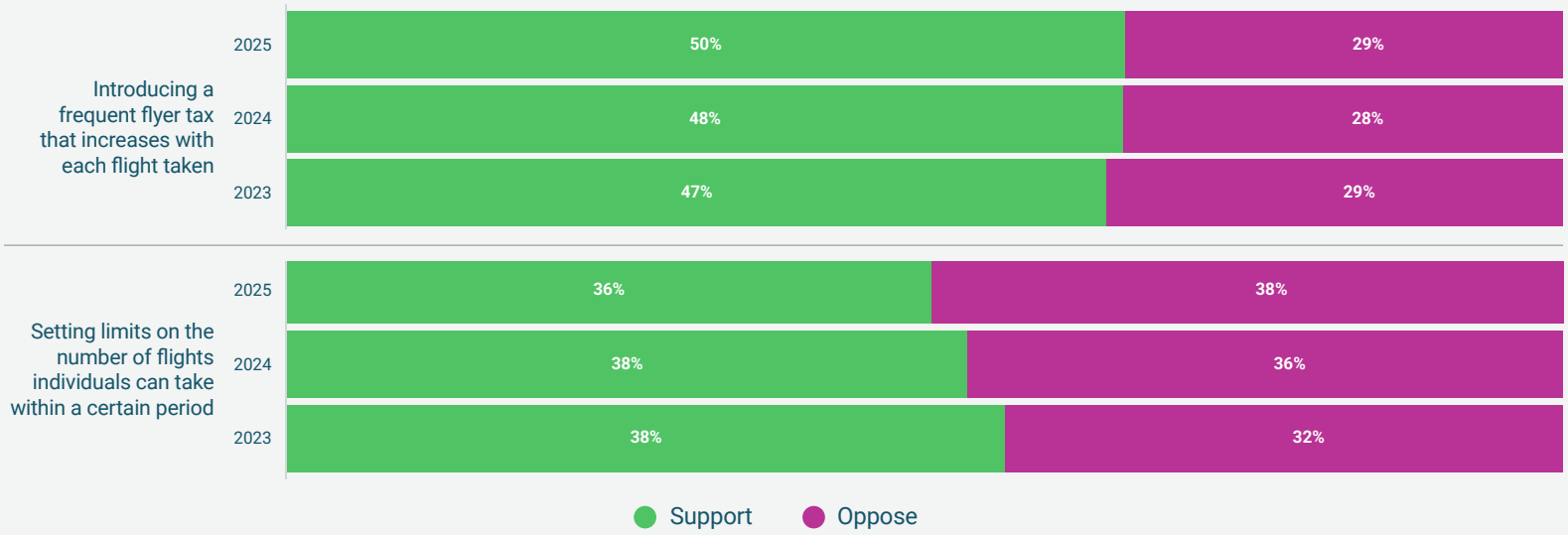
**Q.** The aviation industry is exploring several options to help reduce the impact of greenhouse gas emissions caused by air travel. Please read the following options and rank them in order of the priority you think the aviation industry should give them to reduce the impact of greenhouse gas emissions caused by air travel.



## Frequent flyer tax

Support for introducing a frequent flyer tax— a levy that increases with the number of flights taken annually—showed a slight upward trend, indicating growing public openness to behaviour-based financial measures aimed at reducing air travel emissions. In contrast, support for more restrictive approaches, such as placing limits on the number of flights individuals can take, saw a modest decline. These shifts suggest that while the public is increasingly receptive to fair, incentive-driven policies, there is less appetite for rigid travel restrictions.

**Q.** To what extent would you oppose or support each of the following to address climate change and reduce greenhouse gas emissions?



# Evolving travel behaviours

# Evolving Travel Behaviours

Commercial air travel has continued its post-Covid recovery, with 58% of the UK public reporting that they have flown in the past 12 months, the highest level since 2019 (55%). This marks a clear upward trend from recent years: 50% in 2024, 41% in 2023, 26% in 2022, and just 13% in 2021.

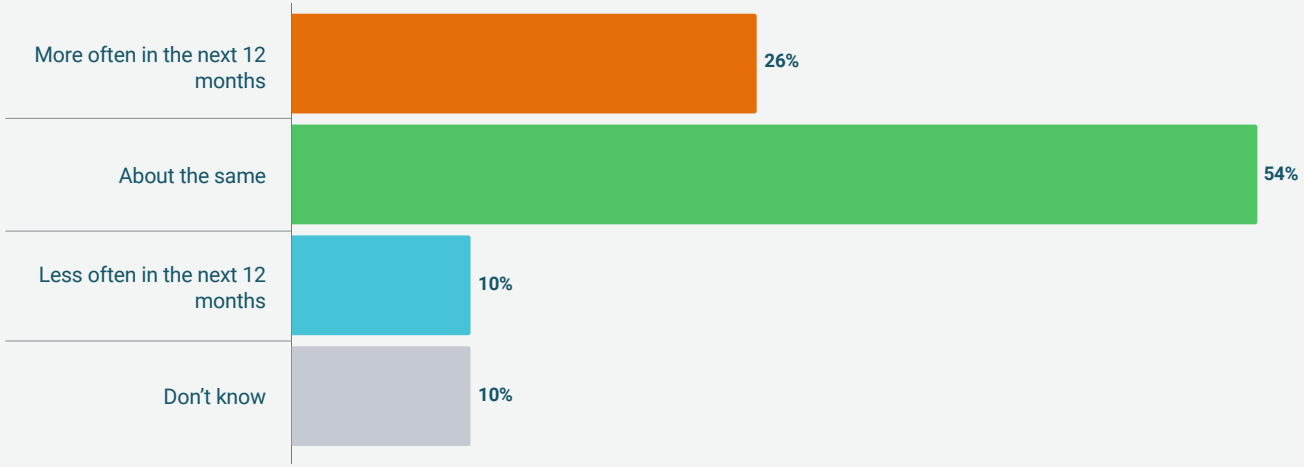
**Q.** When was the last time you personally flew by commercial airline to travel to any destination, inside or outside of the UK?

| | |
|---|---|
| Within the past 12 months | 58% |
| Over 1 and up to 3 years ago | 11% |
| Over 3 and up to 5 years ago | 6% |
| More than 5 years ago | 20% |
| Never | 5% |
| Don't know / can't remember | 1% |

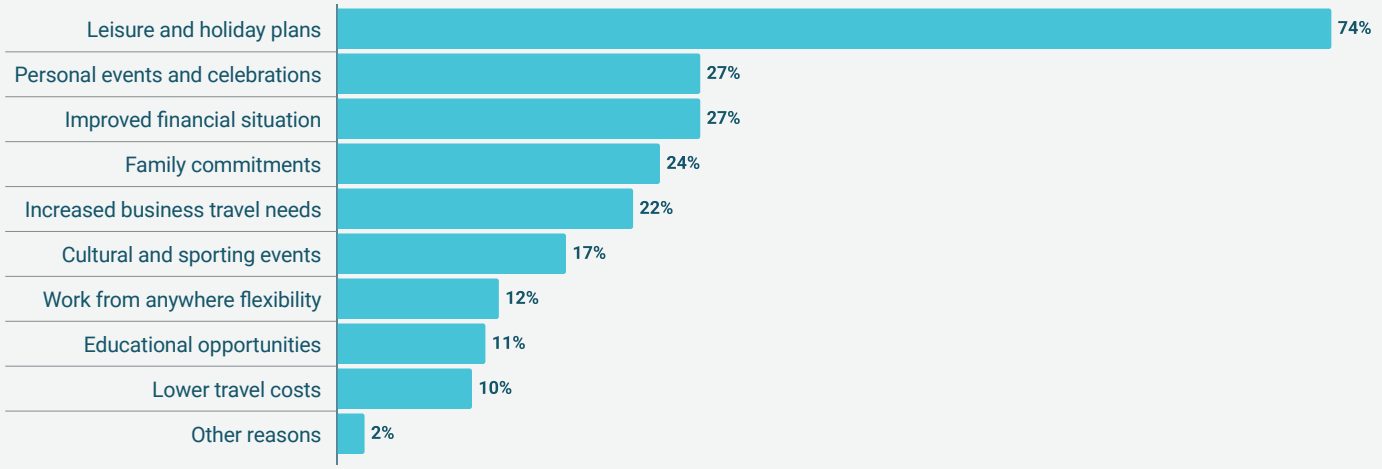
The 2025 Aviation Index shows that just over half of the UK public (52%) have taken an international flight in the past 12 months, compared to 32% who have flown domestically. This highlights a clear preference for international travel, driven largely by leisure, which remains the main reason for increased travel expectations. Among those planning to fly more in the year ahead, 74% cite holidays and leisure as the primary motivation.

Meanwhile, 26% expect to fly more in the next 12 months, with expectations especially high among younger adults (45% of 25–34-year-olds) and ethnic minority groups (44%).

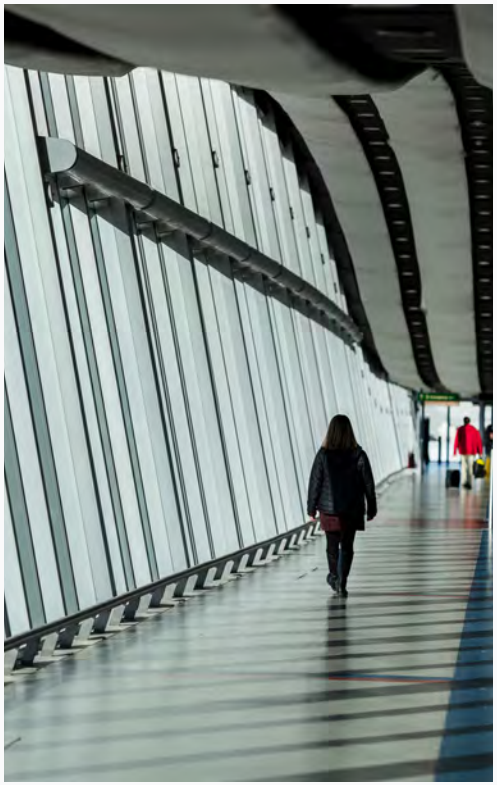
**Q.** In the next 12 months, do you personally expect that you will fly by commercial airline more often than you have done in the last 12 months, less often, or about the same amount?



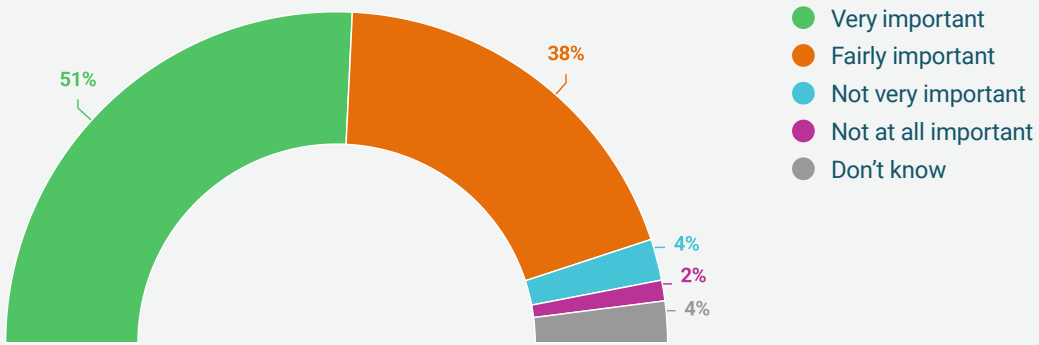

**Q.** You mentioned that you expect that you will fly by commercial airline more often in the next 12 months than you have done in the last 12 months. Which, if any, of the following are your reasons for this?



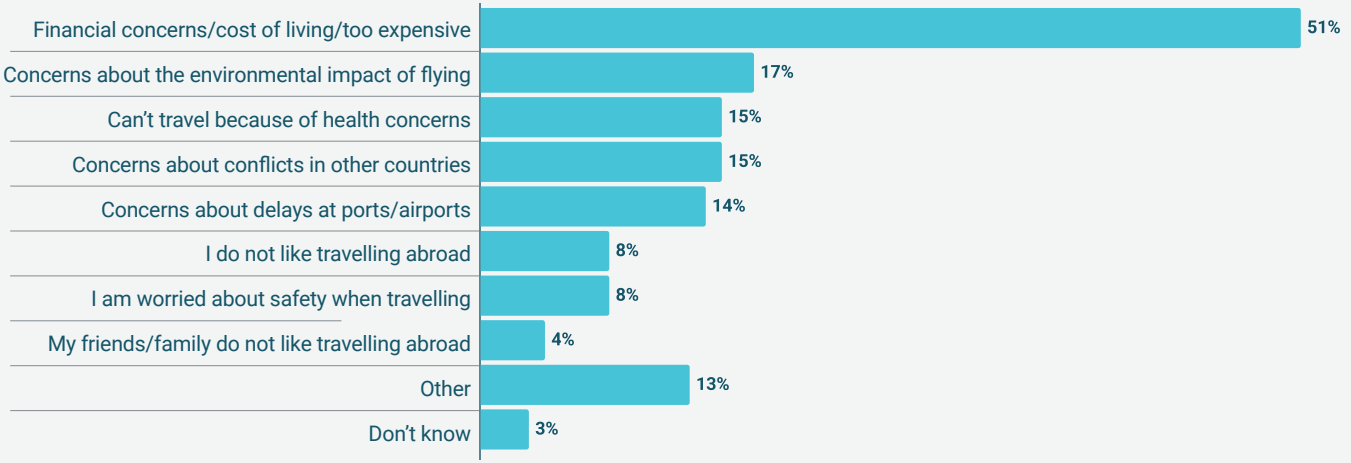
The cost of flying remains the most influential factor in travel decisions—highlighted by 89% of people as important when considering whether or not to fly. For those expecting to fly less in the next 12 months, 51% point to cost as the main deterrent. When it comes to domestic travel, the decision to fly over using other forms of transport is often driven by convenience (58%), travel distance (53%), and comfort (39%), indicating that air travel still offers a perceived advantage over road or rail in certain circumstances.



**Q.** How important is the cost of flying when considering whether or not to travel by commercial airline?




**Q.** You mentioned that you expect that you will fly by commercial airline less often in the next 12 months than you have done in the last 12 months? Which, if any, of the following are your reason(s) for this?



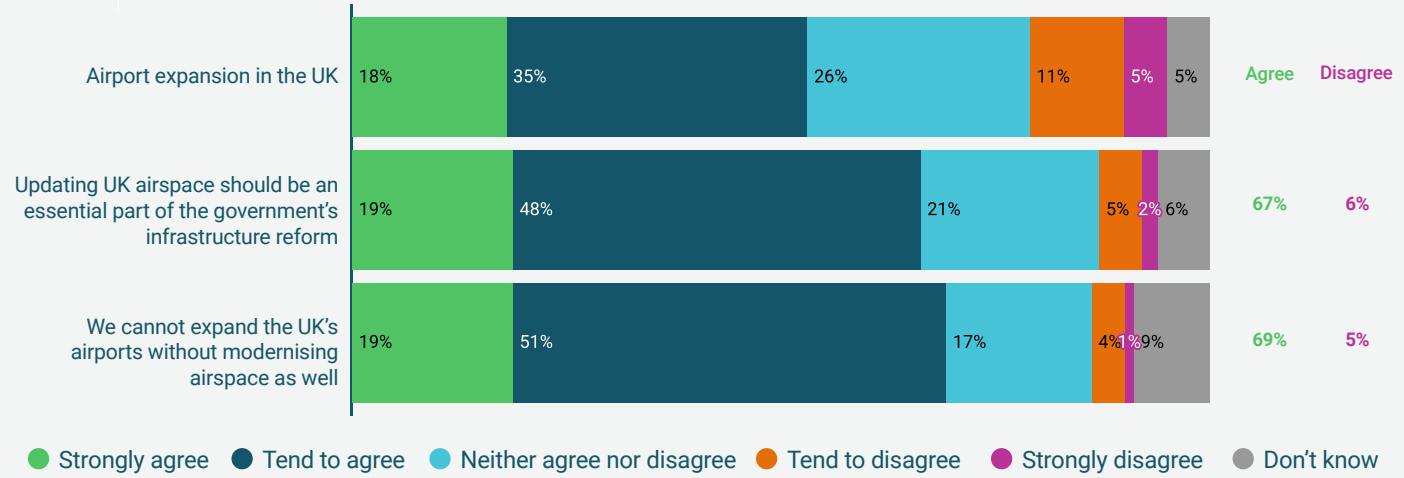
# Airspace Modernisation: Awareness and Support

# Airspace Modernisation: Awareness and Support

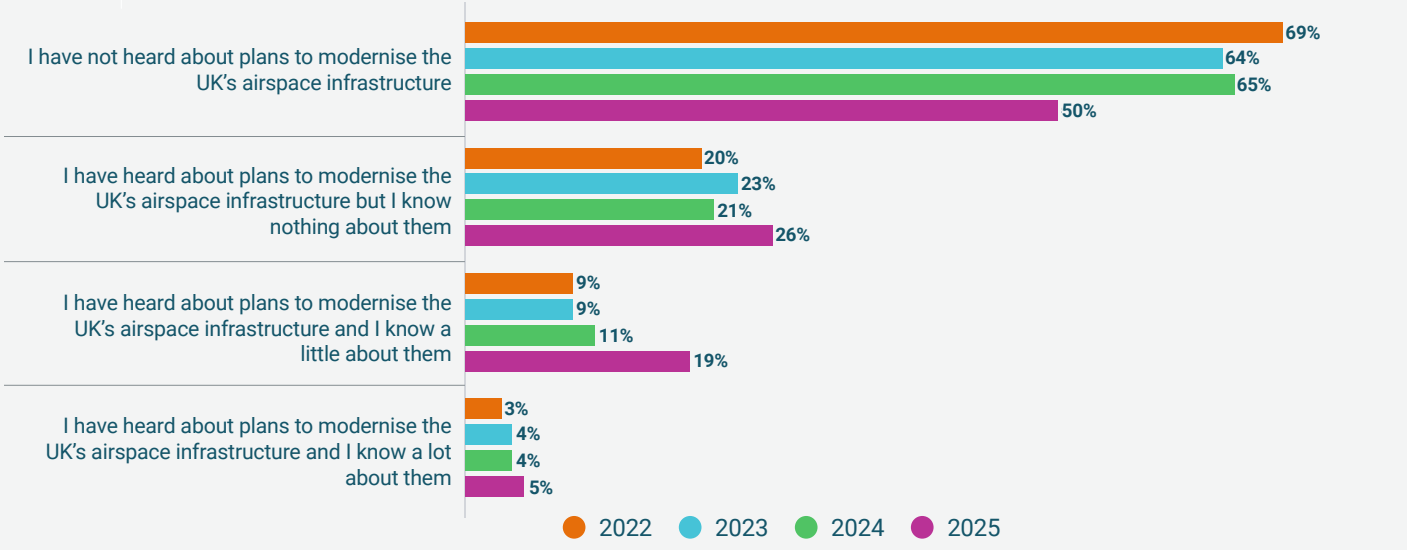
Support for modernising the UK's airspace appears firmly rooted in its perceived importance for the future of aviation. 69% of respondents agree that airport expansion cannot happen without airspace modernisation, while 67% view airspace reform as an essential part of the UK's broader infrastructure improvement agenda.

Awareness of these plans is also rising: 19% of respondents say they have heard of airspace modernisation and know a little about it—up from 11% in 2024—while those who have heard nothing dropped significantly to 50%, down from 65% the previous year.

**Q.** To what extent do you agree or disagree with the following statements about airport expansion:

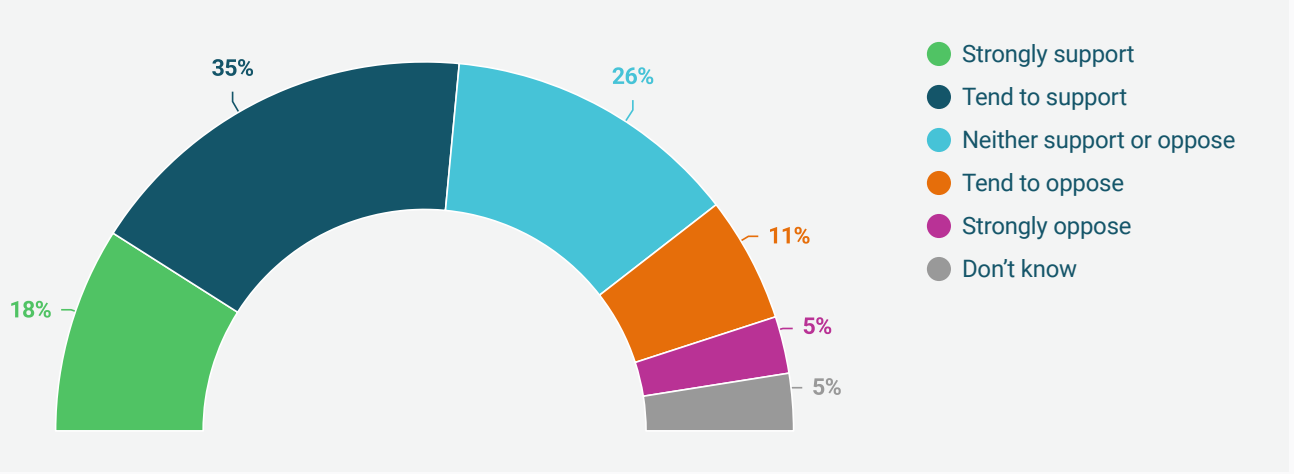


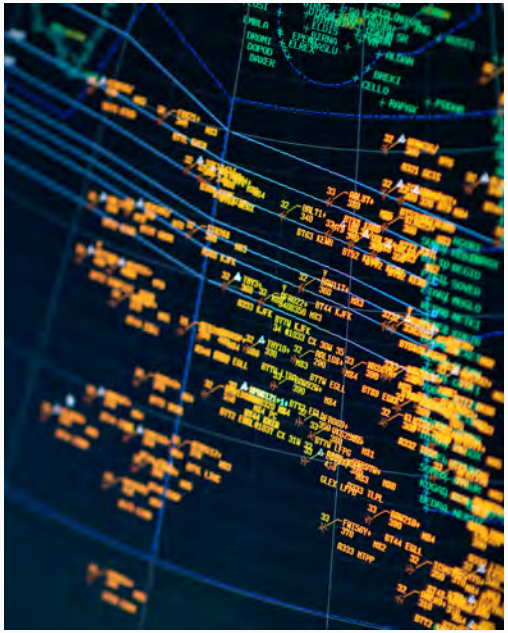

**Q.** Before today, which of the following best describes your knowledge of plans to modernise the UK's airspace infrastructure?



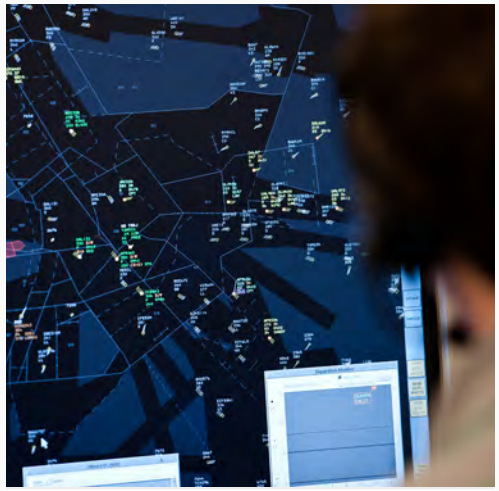
While airspace modernisation enjoys broad support, public opinion on airport expansion is more cautious. Just over half of respondents (53%) are in favour of expanding UK airports, while 16% are opposed—suggesting that the public is more comfortable with improving how the current system operates than with physically enlarging airport infrastructure.

Q. To what extent, if at all, do you support or oppose airport expansion in the UK?



Public backing for changes to flight paths continues to grow, particularly when those changes are framed around benefits such as reduced emissions, fewer delays, and more flight options.



In 2025, support for flight path changes increased to 52%, a notable rise from 42% in 2024, while opposition dropped from 40% to 33%.

## Q. To what extent do you support or oppose changes to flight paths if this means that...

It reduces aviation's impact on the environment by reducing $CO_2$ emissions per flight

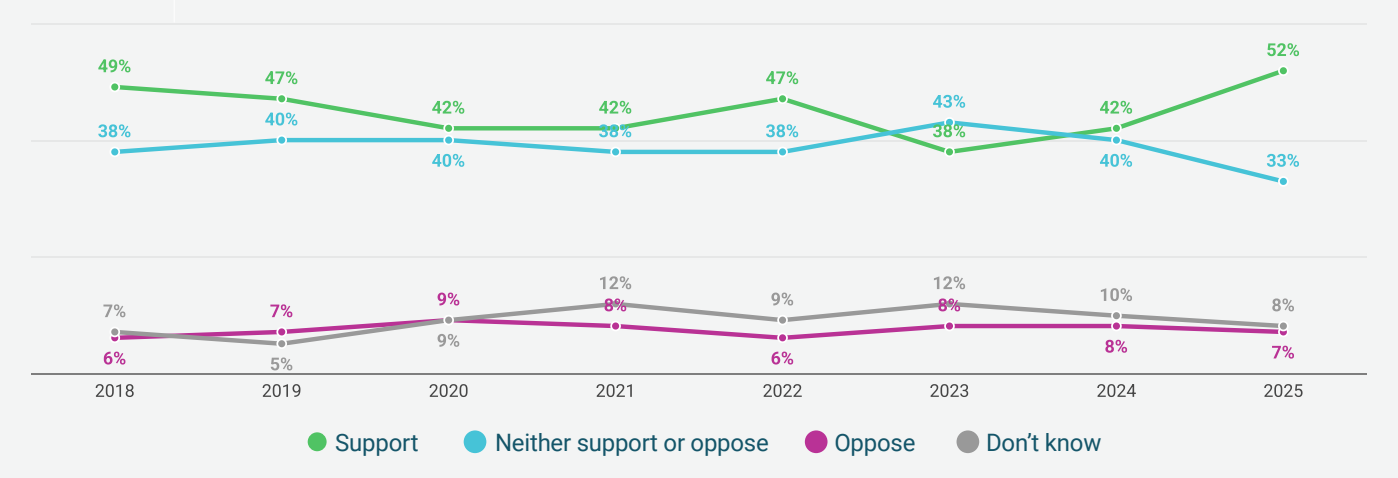
The likelihood of delays to flights is reduced

There is more choice for customers with more flights possible in the longer term

Fewer residential areas experience aircraft noise, but those which do experience it more often than they do now

Some residential areas are located under flight paths for the first time

## Q. In general, to what extent do you support or oppose changes to flight paths?



# Emerging Technologies and the Future of Aviation

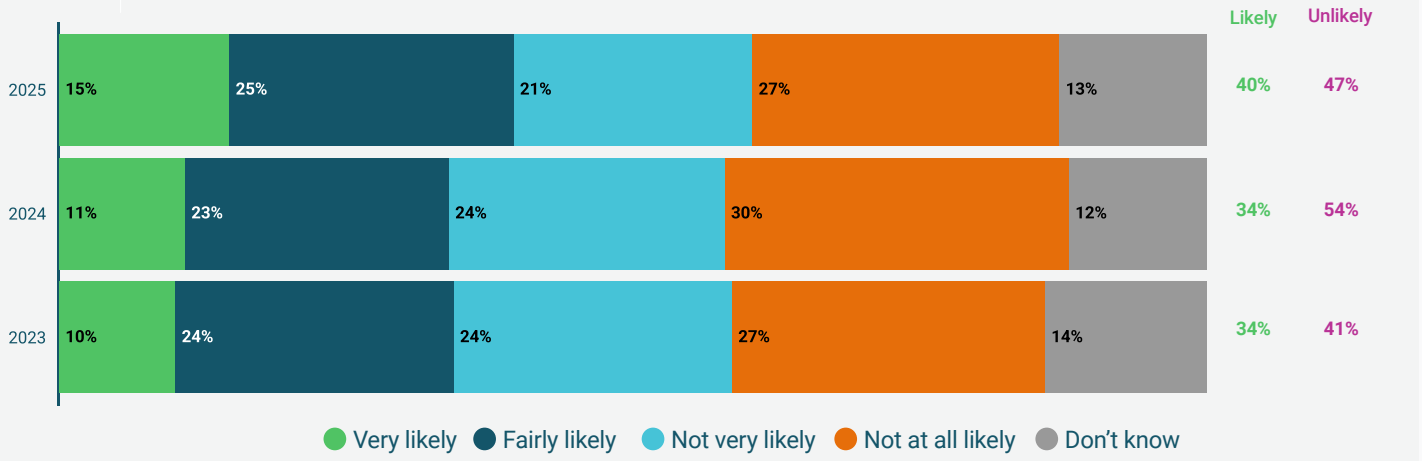
# Emerging Technologies and the Future of Aviation

Public openness to innovation in aviation is steadily increasing, particularly as new technologies promise to improve efficiency, safety, and accessibility. The 2025 Aviation Index highlights growing support for next-generation Advanced Air Mobility solutions such as flying taxis and drones, alongside a cautious acceptance of Artificial Intelligence in air travel operations.

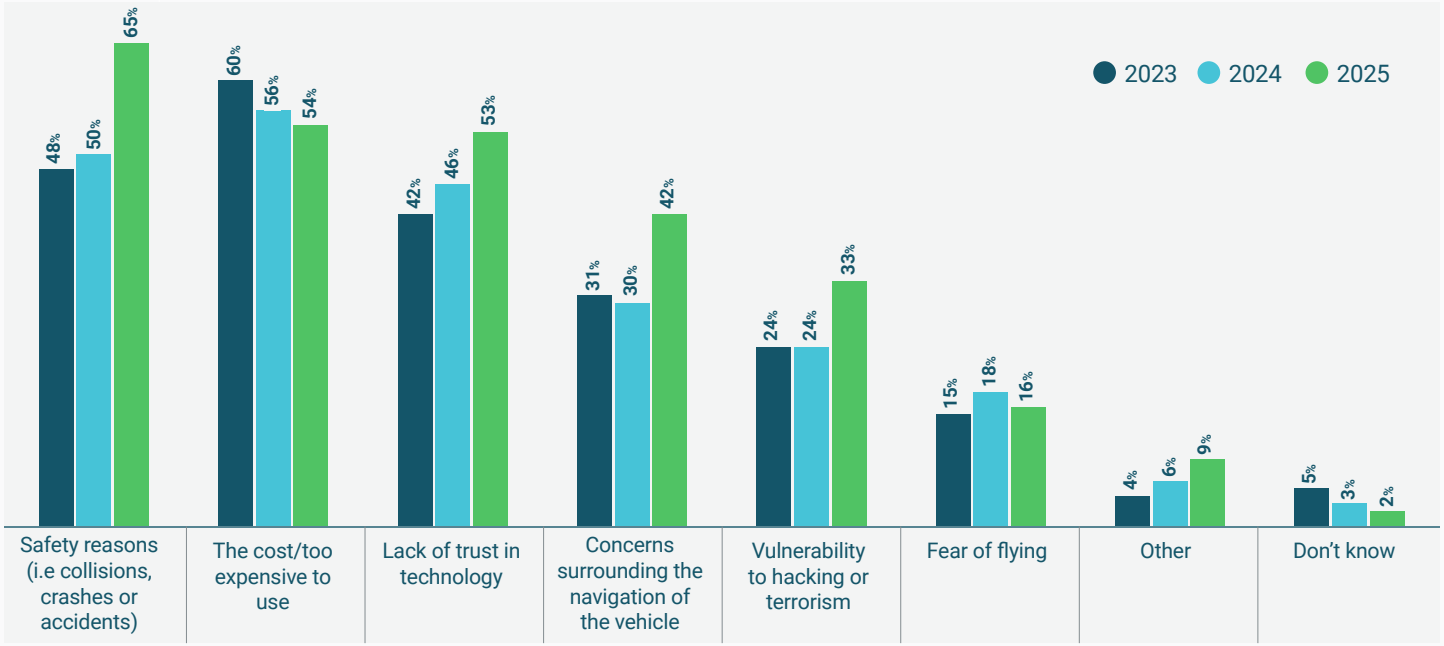
Notably, the likelihood to use flying taxis has increased significantly, with 40% of the UK public saying they would be open to using them if available—up from 34% in 2024.

While enthusiasm is building, concerns persist. The top reservations include safety, cost, and a lack of trust in this still-emerging technology. Nevertheless, the upward trend in acceptance signals a potential shift in public attitudes as the concept of urban air mobility becomes more familiar and more companies test real-world applications.

**Q.** If flying taxis were available to use in your city or local area, how likely or unlikely would you be to use one?



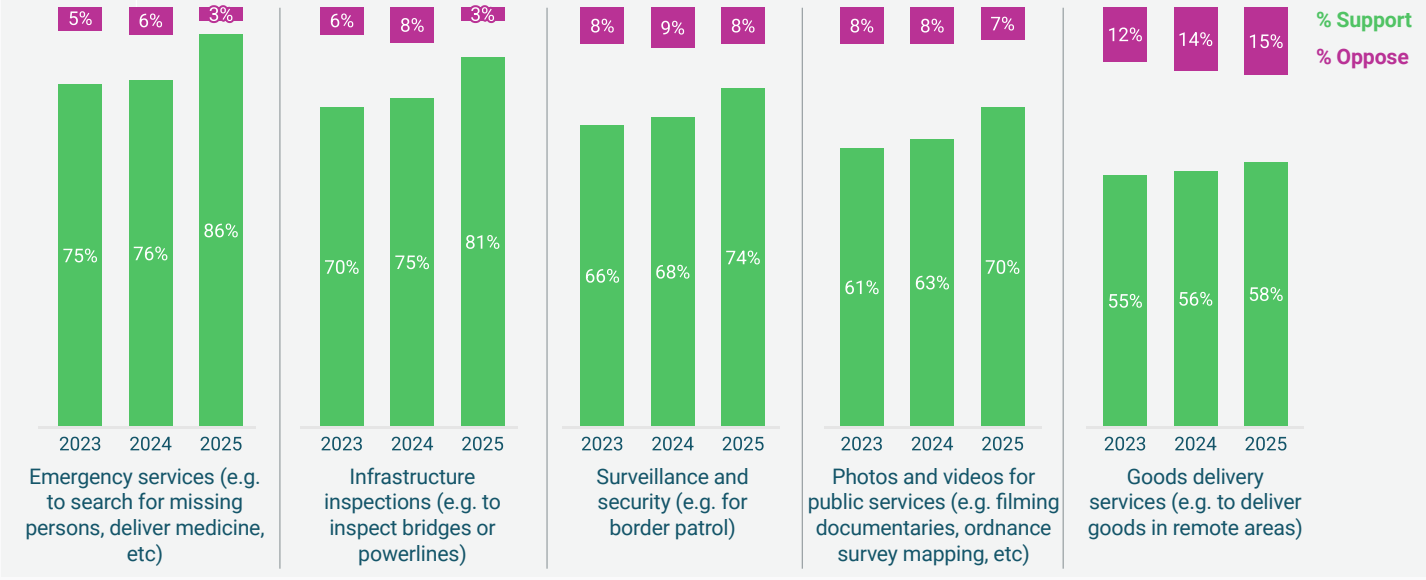

**Q.** You said you would be unlikely to use a flying taxi if they were available to use in your city or area. What makes you say this?



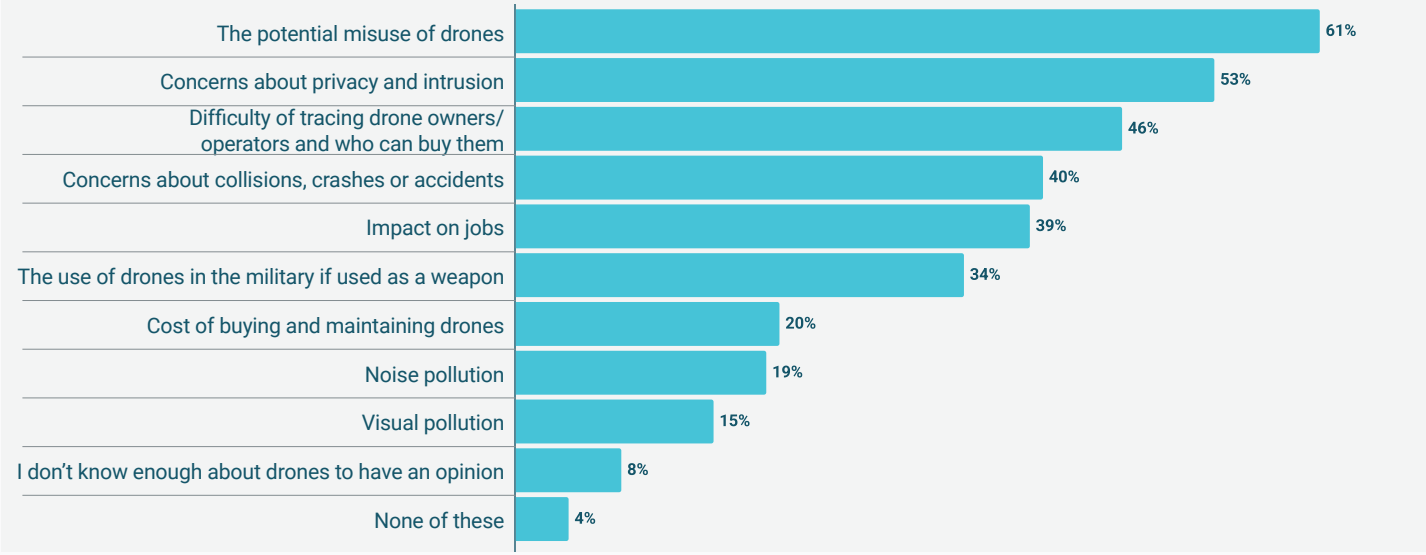
Support for the use of drones in public services is even stronger and continues to rise. The majority of the public back their use in a range of practical applications: 86% support drones in emergency services, 81% for infrastructure inspection, 74% for security and surveillance, and 70% for public-sector photography and videography. These results suggest drones are widely perceived as effective tools for improving efficiency, safety, and supporting critical public functions where speed and precision are essential.

However, concerns around privacy, airspace safety, and noise pollution persist—and could potentially grow as drone usage expands, particularly in urban or residential areas where their presence is more visible. Public confidence depends heavily on how drones are regulated, where they are used, and the transparency of their purpose.

**Q.** To what extent do you support or oppose drones being use for the purposes of...



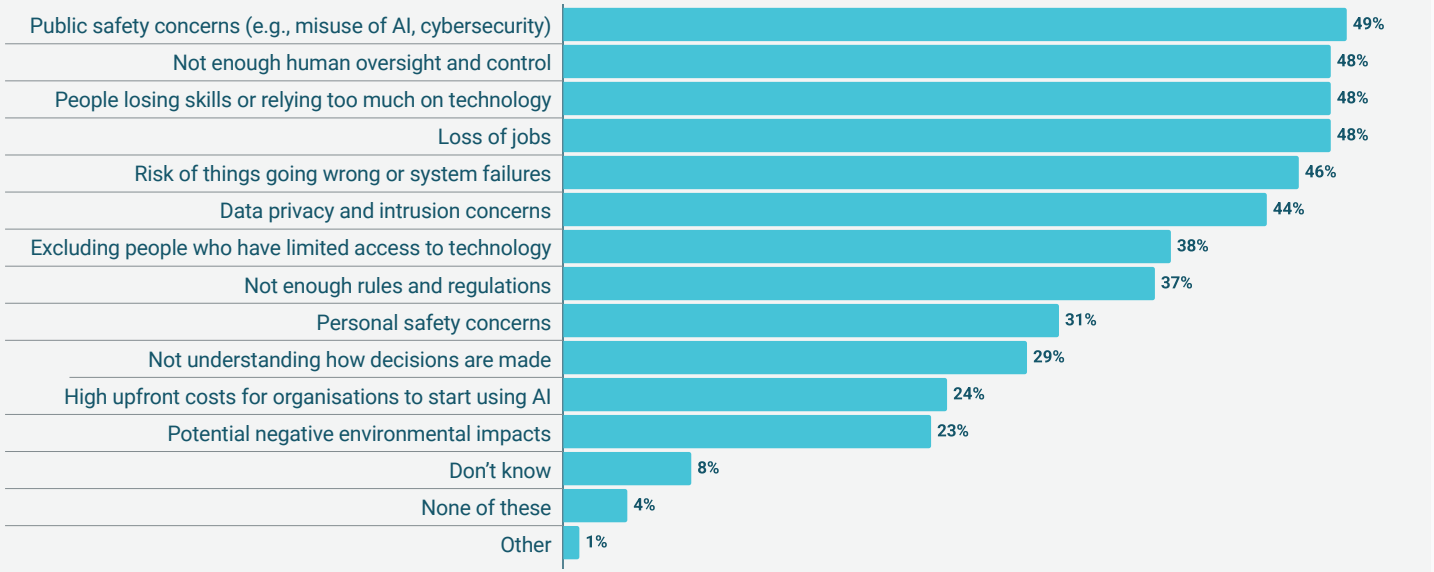

**Q.** Which of the following concerns, if any, do you have about the use of drones?



Public attitudes toward Artificial Intelligence (AI) in aviation reveal a balance between optimism and caution. While AI is increasingly recognised as a tool with the potential to enhance safety, efficiency, and the passenger experience, concerns about its broader implications remain significant.

The most commonly cited disadvantage of AI in transport and travel is public safety, identified by 49% of respondents. This is followed by concerns over the lack of human oversight, data privacy, and the reliability of AI in critical systems.

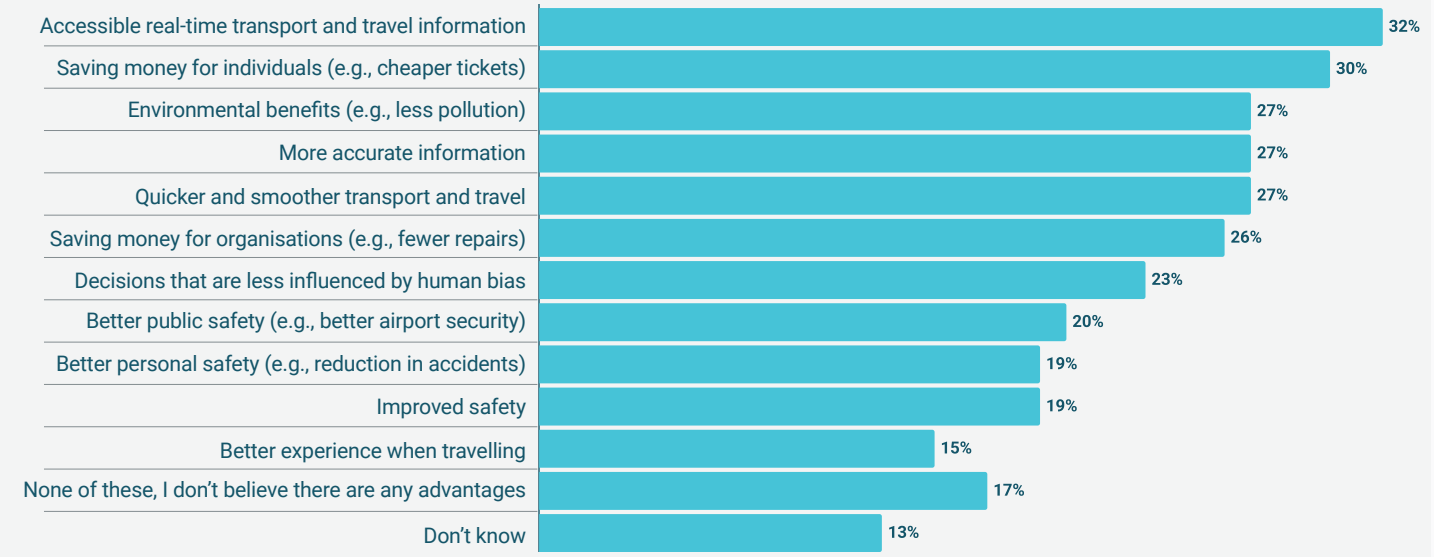
Q. Which of the following, if any, do you think are **disadvantages** of artificial intelligence (AI) being used in transport and travel?

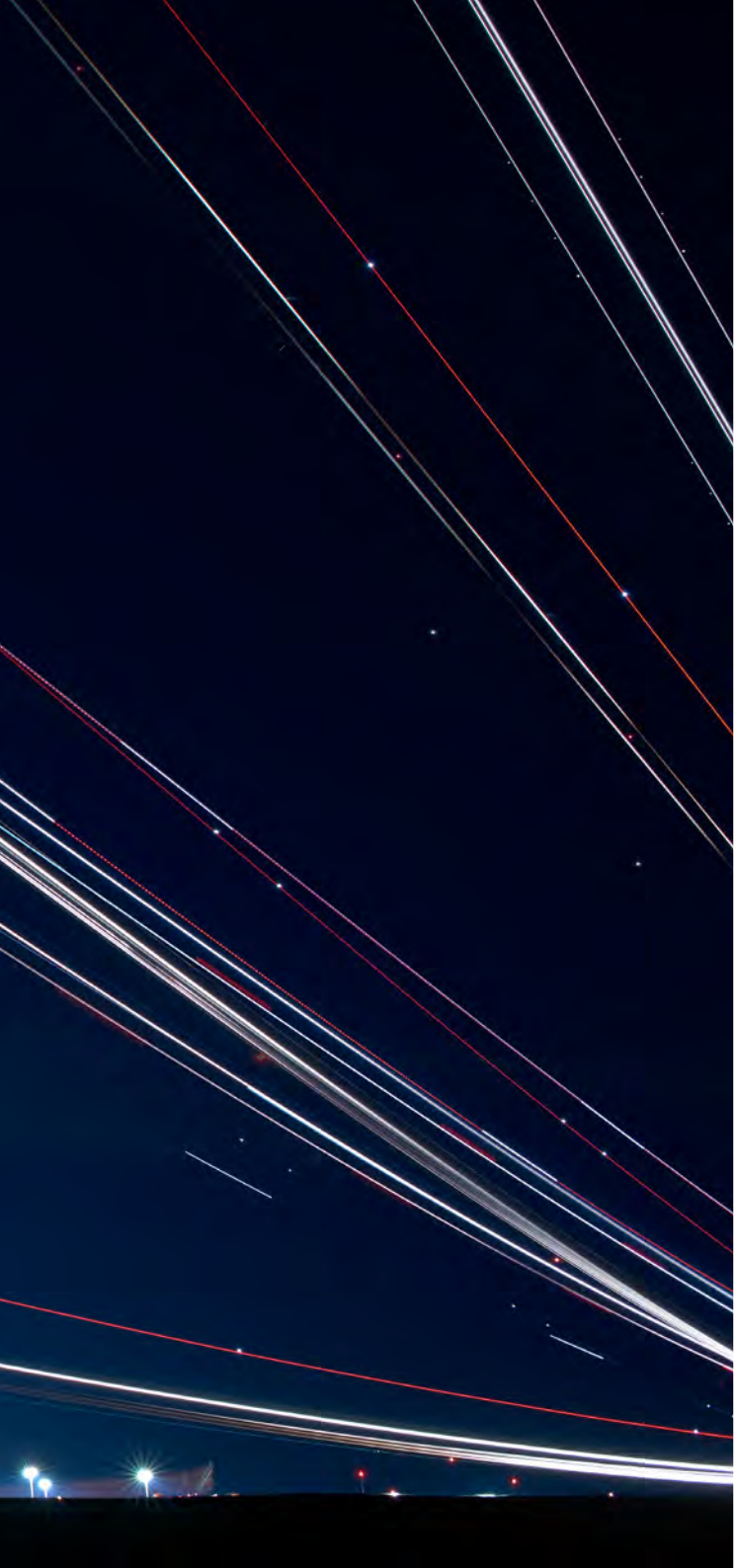



Despite these concerns, support for specific, well-defined applications of AI is strong. The top perceived advantage, cited by 32% of respondents, is AI's ability to deliver accessible, real-time travel and transport information. This is followed by its potential to help passengers save money and deliver environmental benefits. While improving passenger safety and enhancing operational efficiency ranked lower on the list, they are still recognised by a portion of the public as meaningful.

Notably, 68% of respondents support the use of AI to detect dangerous items in luggage—an application where automation clearly strengthens security protocols. Additionally, 50% back the use of AI in managing air traffic and flight routing, indicating growing trust in its role within core operational functions as long as human oversight is retained.

Q. Which of the following, if any, do you think are **advantages** of artificial intelligence (AI) being used in transport and travel?





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