

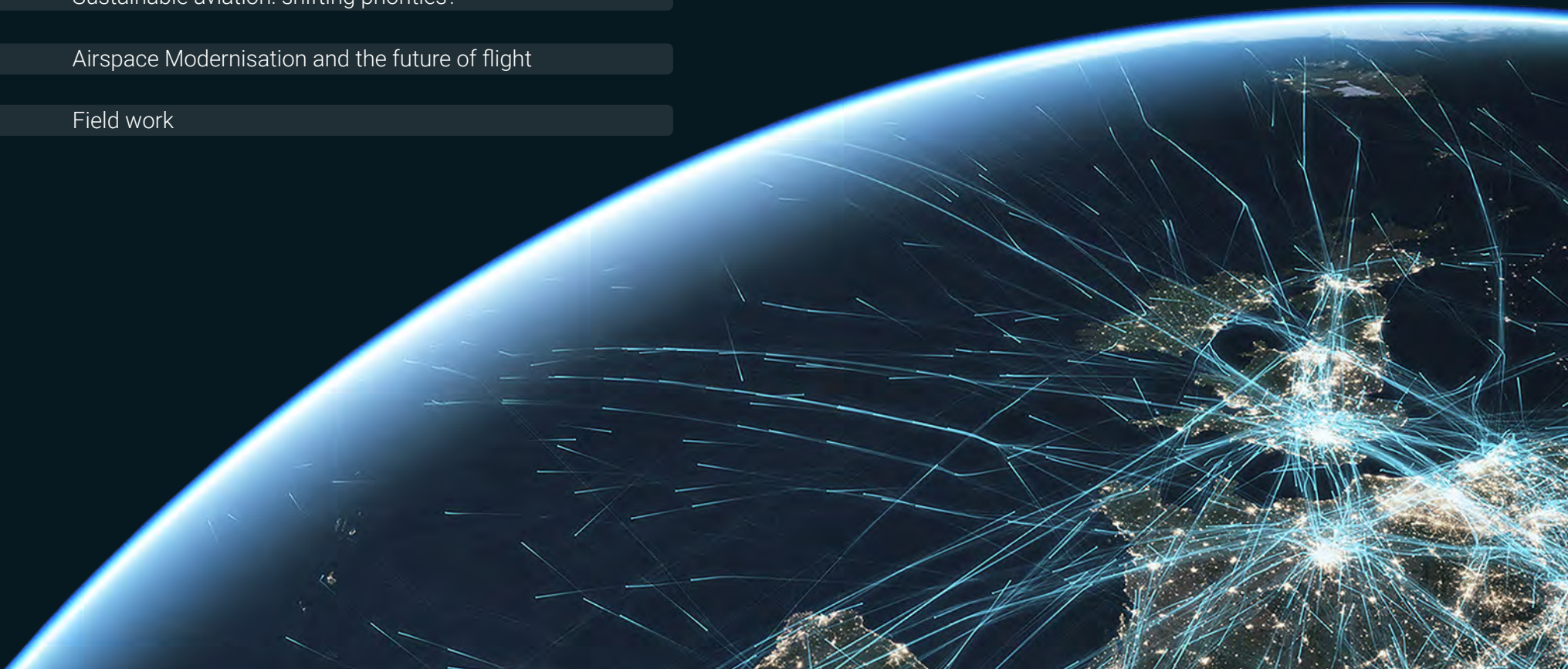


NATS

Aviation Index 2023

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Introduction

Now in its sixth year, the Aviation Index is back for 2023.

Our aim has always been to provide a means to track the public's perception of aviation over time. How people's views on the industry ebb and flow and trends appear and fade. From attitudes to drones and climate change through to the factors that go into choosing one airline over another, we now have six years of valuable data. The Aviation Index is an industry barometer that we hope can inform views, direct energies, and identify opportunities.

Of course, when the Aviation Index began we never envisioned a global pandemic. And even now, a Covid hangover can be perceived in the results, but often in unusual and subtle ways.

After the enormous upheaval of the pandemic on people's lives and the impact on their confidence and willingness to travel, we see now that people are keen to fly again. So keen in fact that some may be willing – perhaps temporarily – to turn a

figurative blind eye to the environmental impact of aviation. That might explain why we see a decline in many of the climate change measures in this year's Index for the first time.

Similarly, we also see a decline in people saying they enjoy flying, a possible result of last year's summer of widespread disruption caused by resourcing issues across parts of the industry. Perhaps for similar reasons, this year's Index also shows growth in support for improving flight paths and capacity. Away from the vagaries of Covid, one of the biggest turnarounds the Aviation Index has charted since its inception is around the use of drones.

Five years since suspected drone activity at Gatwick Airport disrupted 140,00 passengers, the majority of the public now support drone use in all sorts of forms. In a similar mould, current scepticism around the future use of 'air taxis' and urban air mobility will prove fascinating to track given the expected growth in New Airspace Users over the coming years.

A note on field work:

Each year NATS partners with the research specialists at Ipsos to produce the Aviation Index. Over 1,200 members of the UK public – weighted to be representative of the wider population – give their views.

Attitudes to flying: ready to get away

Unsurprisingly, this year's Aviation Index finds that the proportion of people who flew in the last 12 months (41%) continues to **increase post-pandemic**, but it does still remain below 2019 levels (60%). That mirrors the fact that UK air traffic levels remain at around 90% of what they were in 2019, although **some days have exceeded their pre-pandemic peak**.

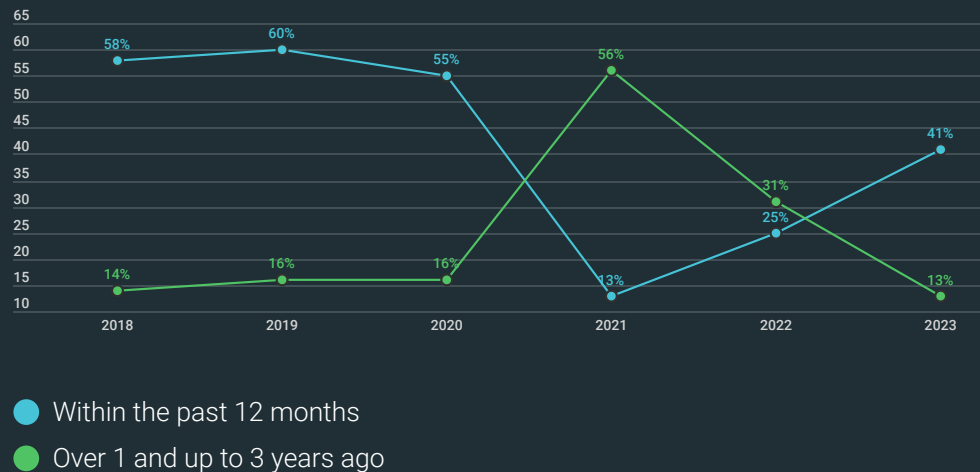
Looking ahead, flying may have settled into something of a steady state in 2023, with most people expecting to fly the same amount over the next year (51%). However, the public do appear to be more open-minded about the possibility of travel abroad this year, with falls in the proportion saying it is unlikely they will book holiday abroad in the next three months (33% vs. 40% last year).



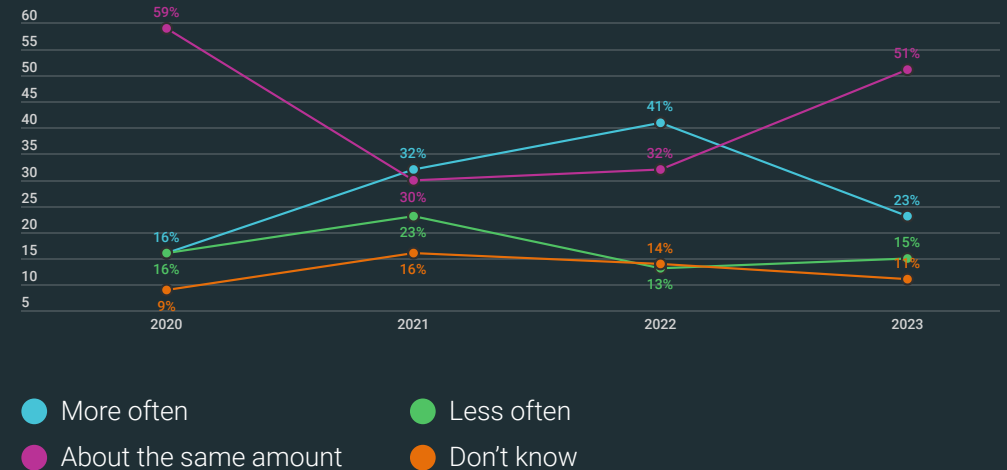
Attitudes to flying: ready to get away

Personal travel by commercial airline has **bounced back** since Covid, but remains **below pre-pandemic** levels

Firstly, thinking about air travel, when was the last time you personally flew by commercial airline?



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?



Most people expect to fly the **same amount over the next year**, while around one in four expect to **fly more**

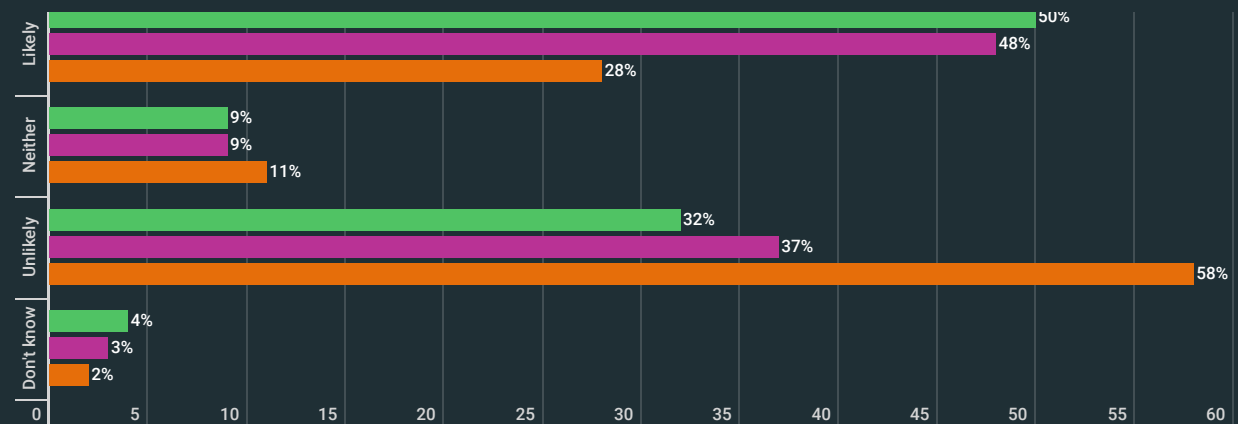
Attitudes to flying: ready to get away

Fewer people think it **unlikely** they will fly abroad this year, with a slight increase in likelihood to travel for business reasons

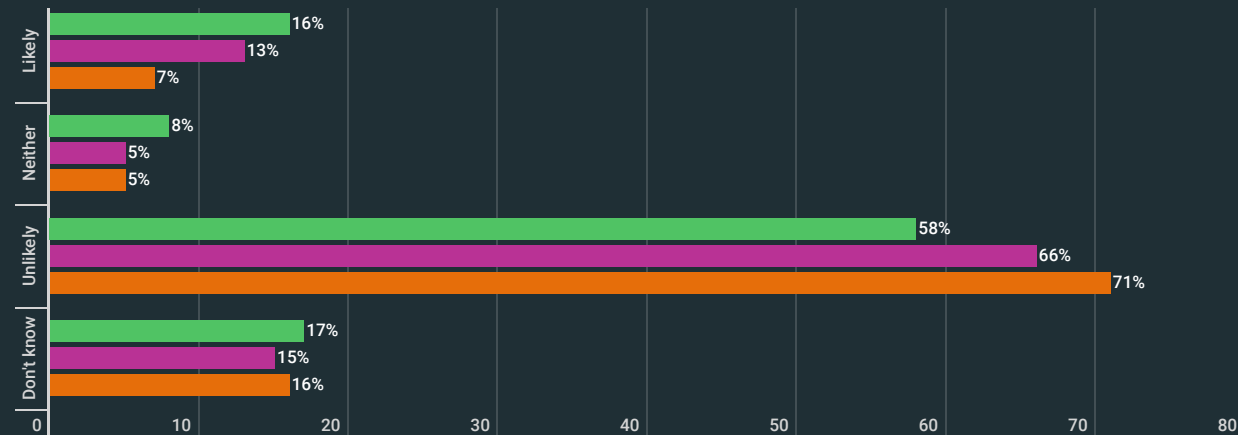


Overall, how likely or unlikely do you think you are to fly abroad by commercial airline this year...?

Flying for pleasure...



...or business



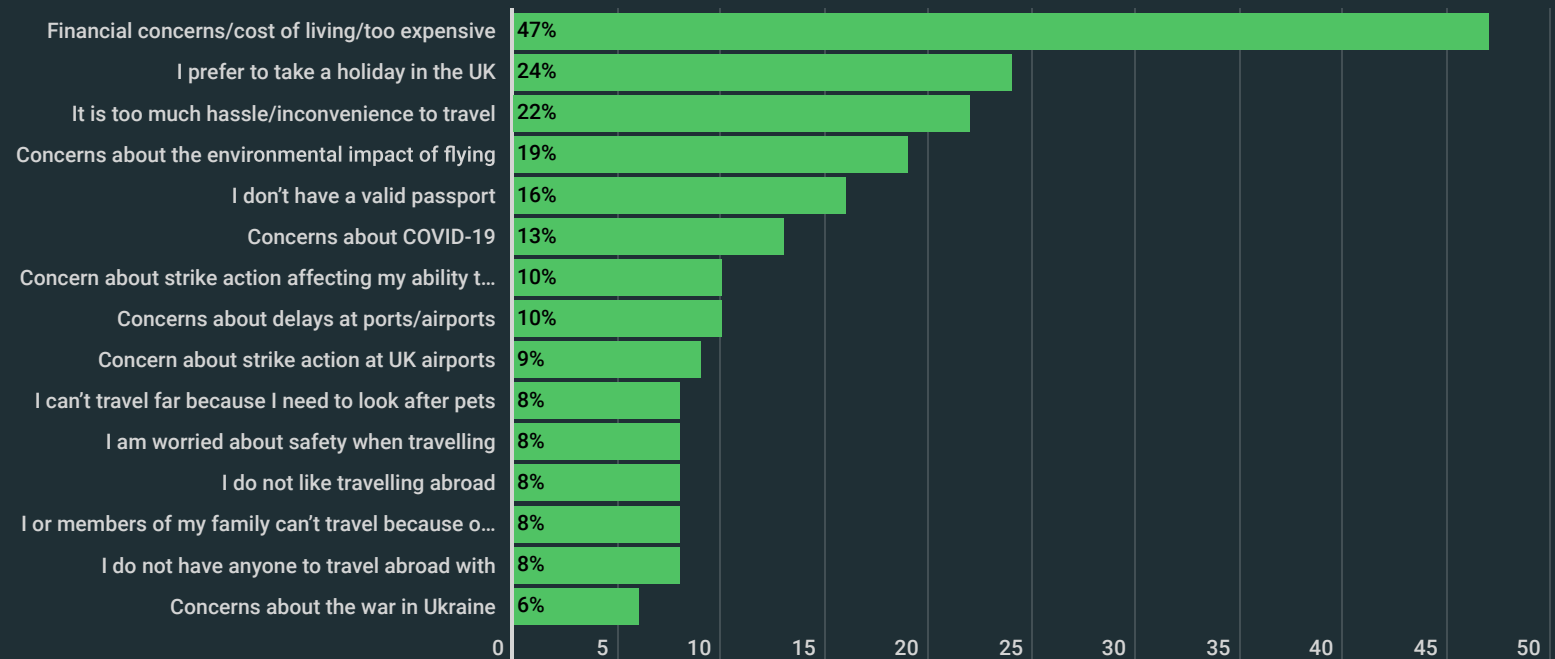
Attitudes to flying: cost of living bites

Cost the decisive factor for those who expect to fly less often in the next 12 months

The cost of living crisis continues to bite this year, with ever higher interest rates putting a squeeze on the amount of disposable income people have to play with. We can see that borne out in the reasons people put forward for flying less this year.

The majority believe that fares have increased, with most attributing this to increased fuel prices (83%) and inflation (79%), among other factors, including Brexit, Covid and the cost of environmental levies.

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?



Attitudes to flying: cost of living bites

Rising fuel prices and inflation seen as biggest causes of price rises



There has been little movement in views on airport expansion despite increasing appetite for travel abroad in 2023. More people support expansion than oppose it, but it remains below the high of 2019.

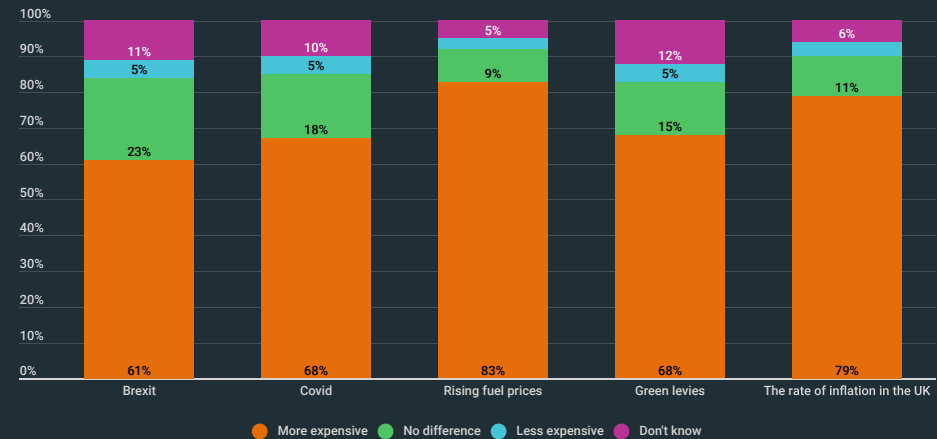
Fewer people now say they enjoy flying as a mode of travel this year (55%) compared to 2022 (63%), while the airport and flying experience itself has grown in importance for passengers. With the cost of travel rising, some people are perhaps placing a premium on ease, accessibility and comfort.



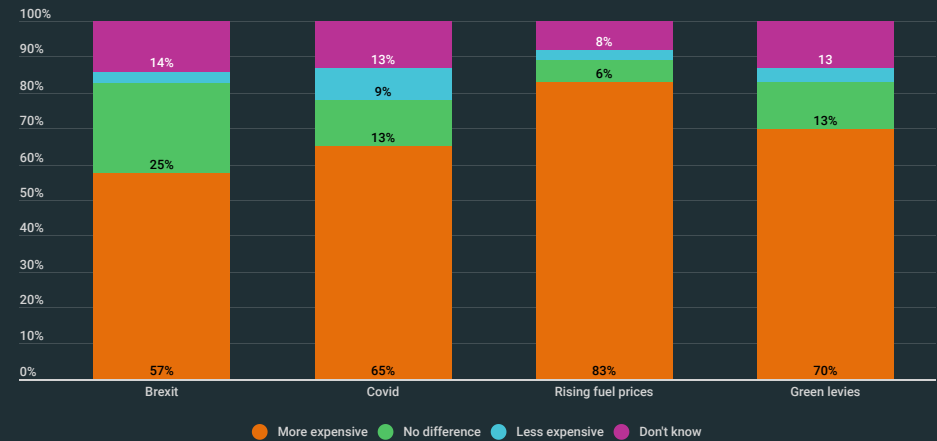
29% of people are 'nervous flyers' and this figure is higher in younger adults (47% in 18-24 year-olds) than in those aged over 55 (19%)

Thinking about the past 12 months, do you think each of the following has made plane fares more expensive, less expensive, or made no difference?

2023



2022

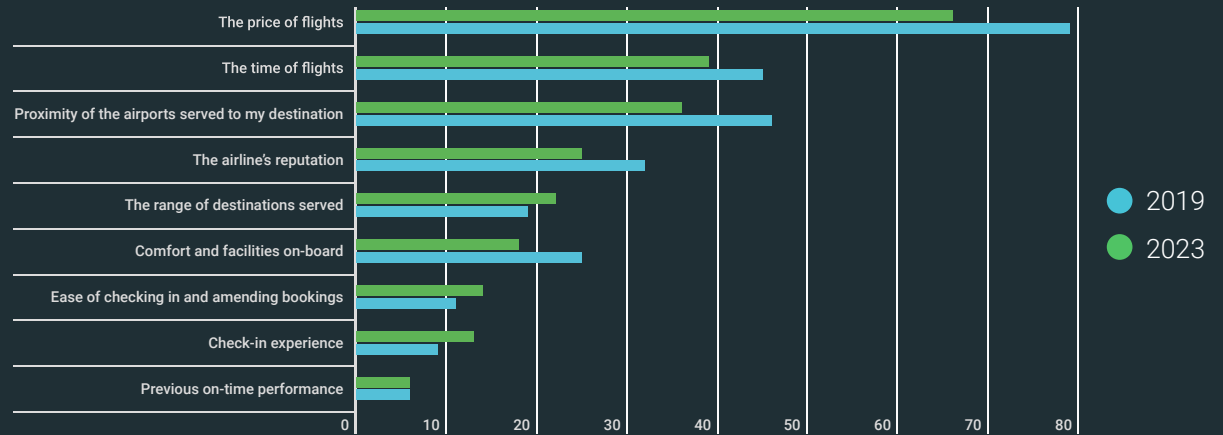


Attitudes to flying: cost of living bites

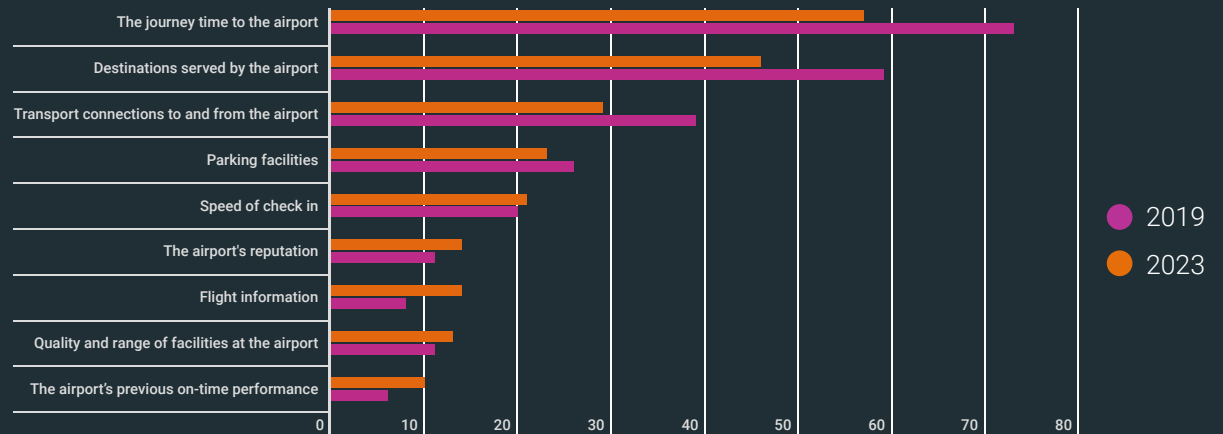
Post-pandemic, experiential factors have **grown in importance** when choosing an airline or airport



Which two or three of the following aspects, if any, would you say are most important to you when deciding which airline you choose to fly with?



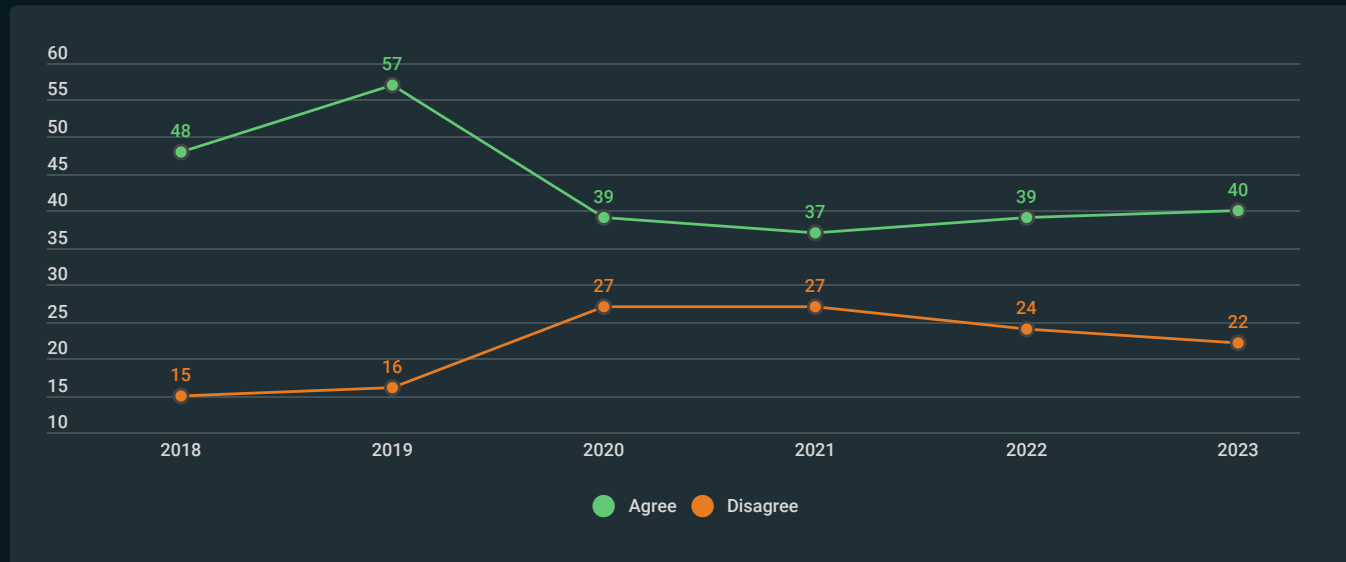
Which two or three of the following aspects, if any, would you say are most important to you when deciding which airport you choose to fly from in the UK?



Attitudes to flying: cost of living bites

Support for airport expansion **remains steady** but below the pre-pandemic high

Do you agree or disagree that airport expansion in the UK is the right thing to do?



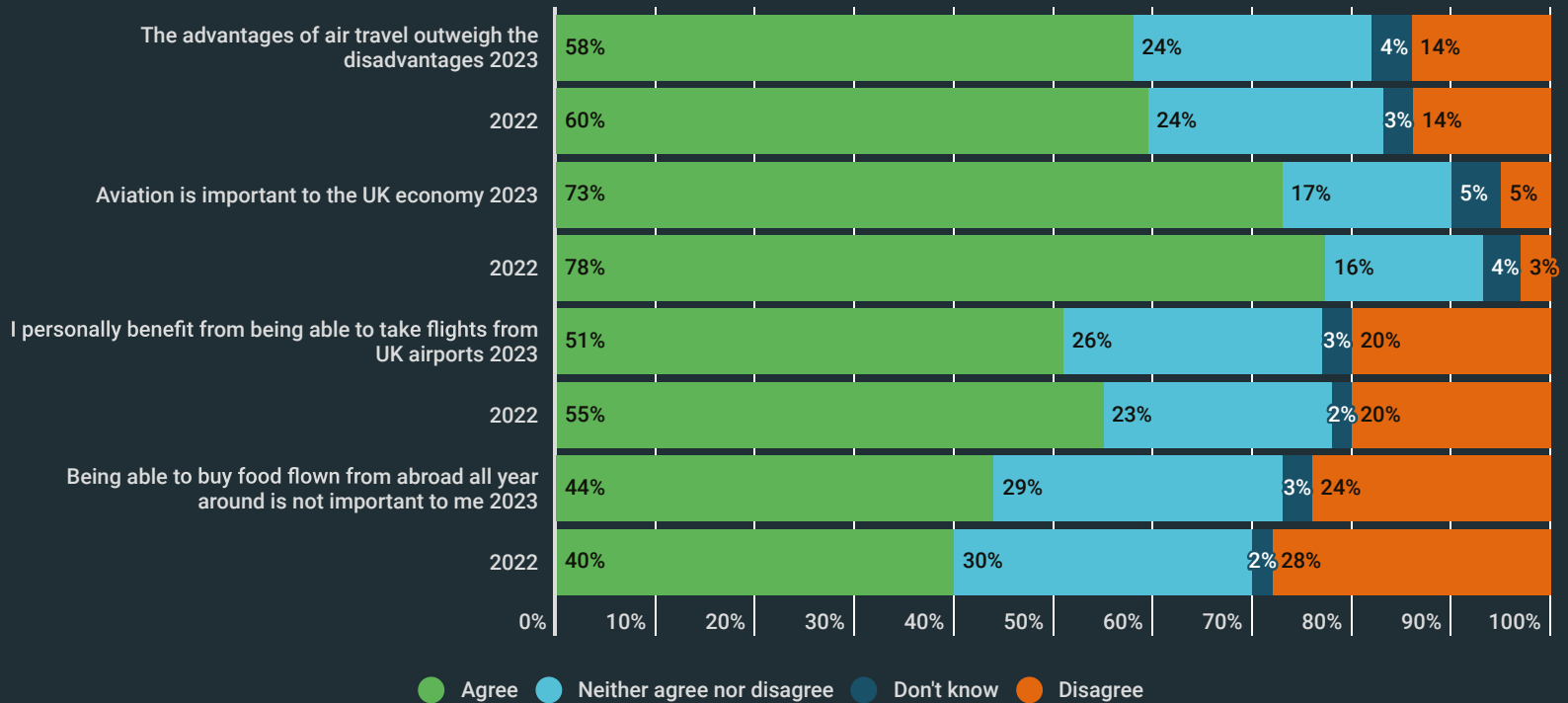
Attitudes to flying: cost of living bites



Awareness of the European Travel Information and Authorisation System (ETIAS) is currently fairly low (34%), though most (66%) expect it will make no difference to how likely or not they are to travel to affected European countries once ETIAS comes into force.

And while three in four people still think aviation is important to the economy (73%), this proportion has fallen since last year (78%).

To what extent do you agree or disagree with each of the following statements?



Sustainable aviation: shifting priorities?

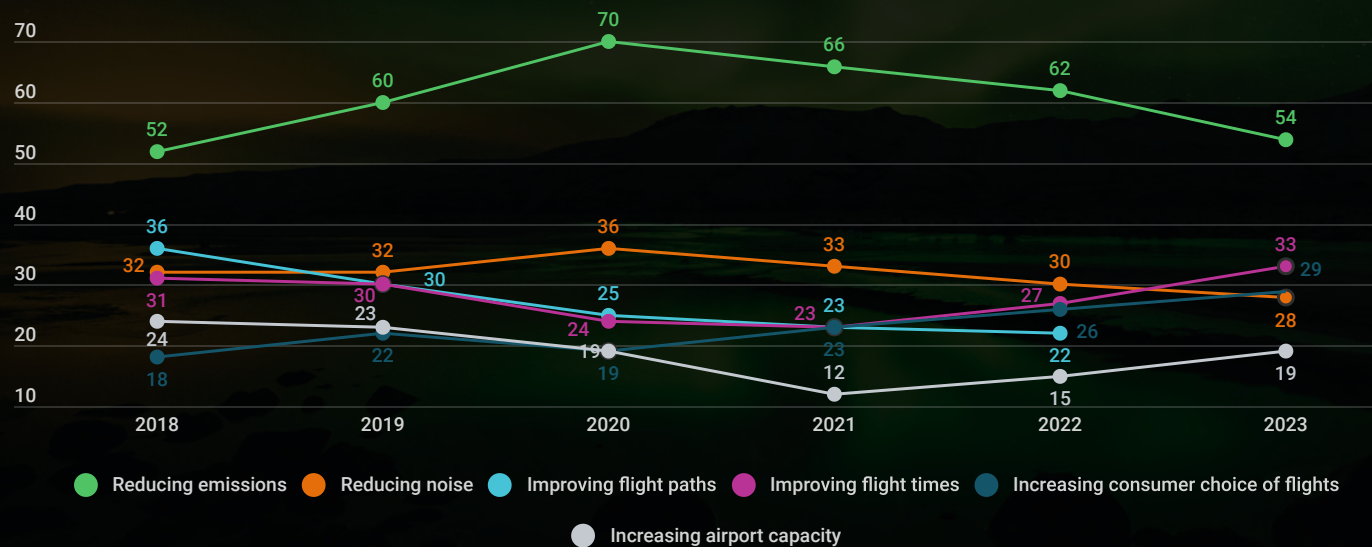
While there is no doubt that the public still sees improving the environmental performance of aviation as the top priority for the industry, there has been a clear softening in those views since 2020.

The public (54%) still mostly feel that emission reduction should be top of then industry's agenda, however this has fallen since the last Aviation Index (62%) and has fallen a full 15 percentage points since its peak.

Greater relative weight is now placed this year on operational changes such as 'improving flight times' (33% vs 27%) and 'increasing airport capacity' (19% vs 15%), perhaps reflecting people's travel experiences over the past year and rising desire to fly following the pandemic.

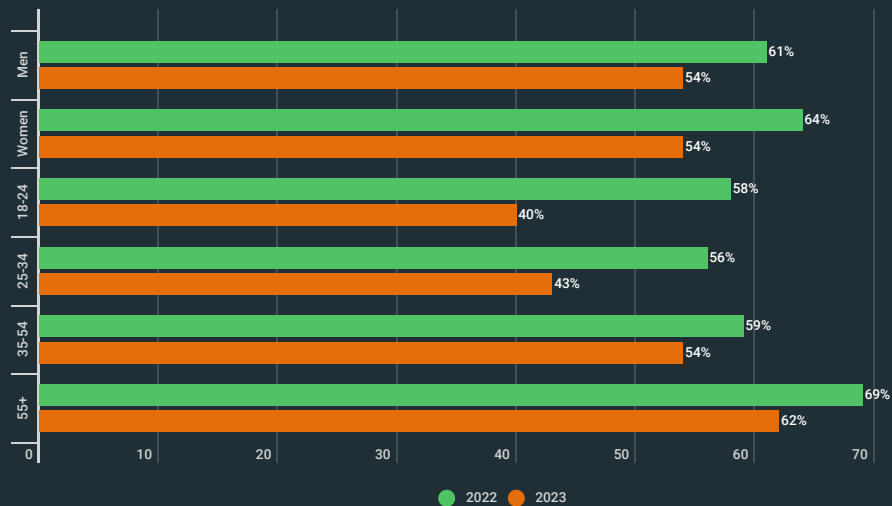
Reducing noise has also fallen from people's second highest priority to fourth place.

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?



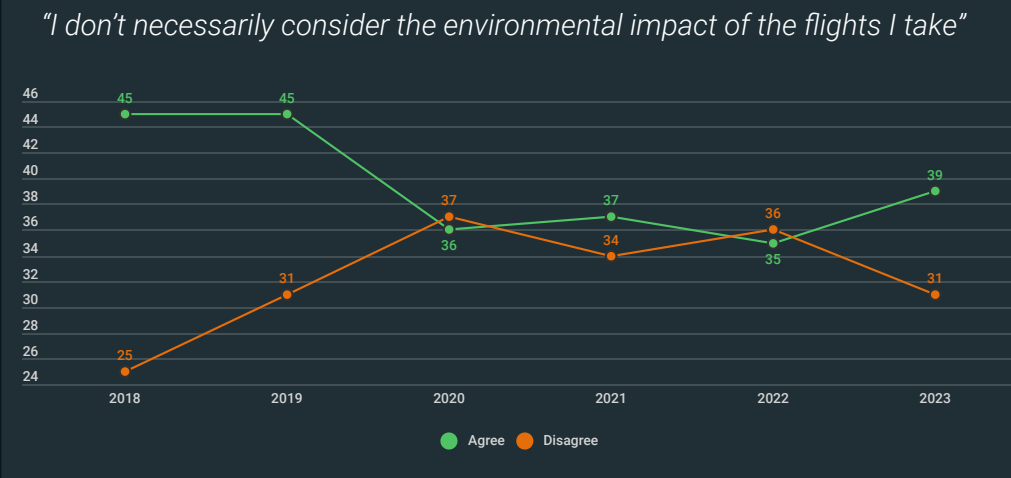
Sustainable aviation: shifting priorities?

The importance of 'reducing emissions' has fallen across all demographic groups, but particularly so among younger adults



The Aviation Index has always charted a 'say/do' gap between the thing people say they are willing to do to reducing their environmental impact, and what they are actually doing. We see this again this year, with a noticeable fall in those who consider the environmental impact of their flights, perhaps indicative of a public that is desperate to get away.

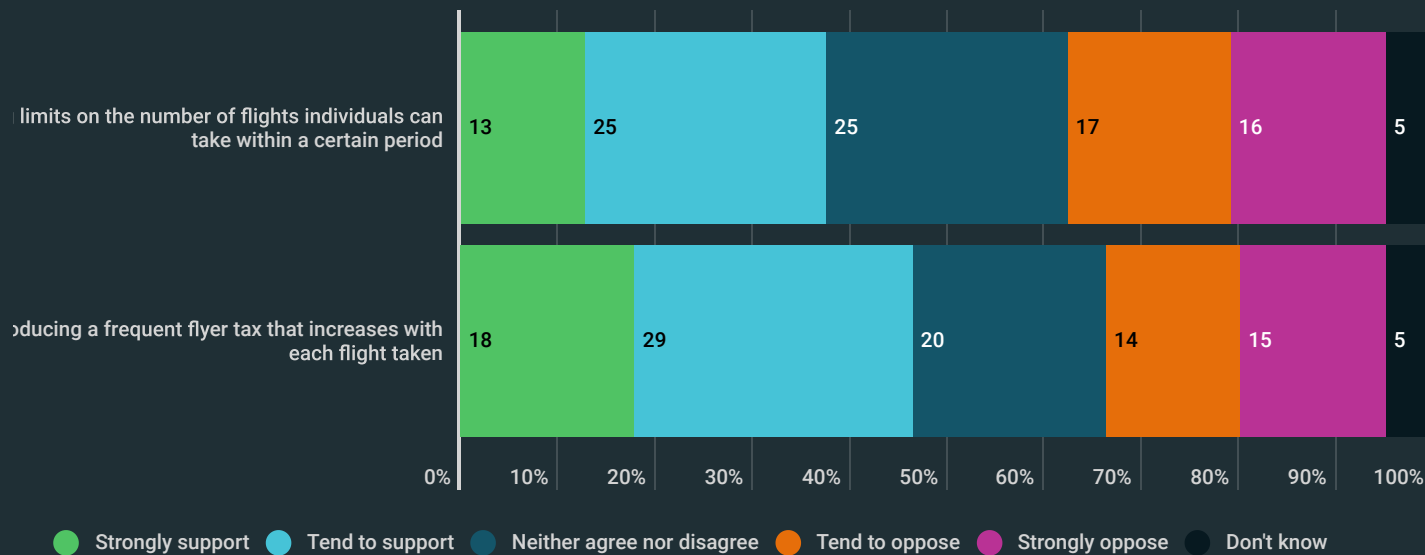
More now say they do not necessarily consider the environmental impact of the flights they take (36% vs 31%) and that others should not be discouraged from flying (42% vs 35%). There is also muted support for policies that aim to limit the number of flights people can take in a certain period (38%), although interestingly a higher proportion support frequent flyer levies (47%).



Sustainable aviation: shifting priorities?

There is muted support for limiting the number of flights individuals can take, but more for measures **targeting frequent flyers**

To address climate change and reduce greenhouse gas emissions, some people have suggested setting limits on the number of flights individuals can take within a certain period or introducing a frequent flyer tax that increases with each flight taken. To what extent would you oppose or support each of the following?

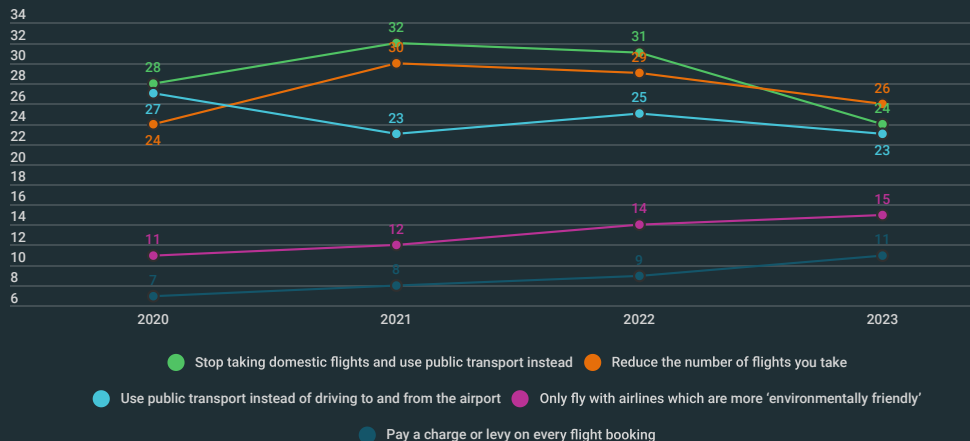


Sustainable aviation: shifting priorities?

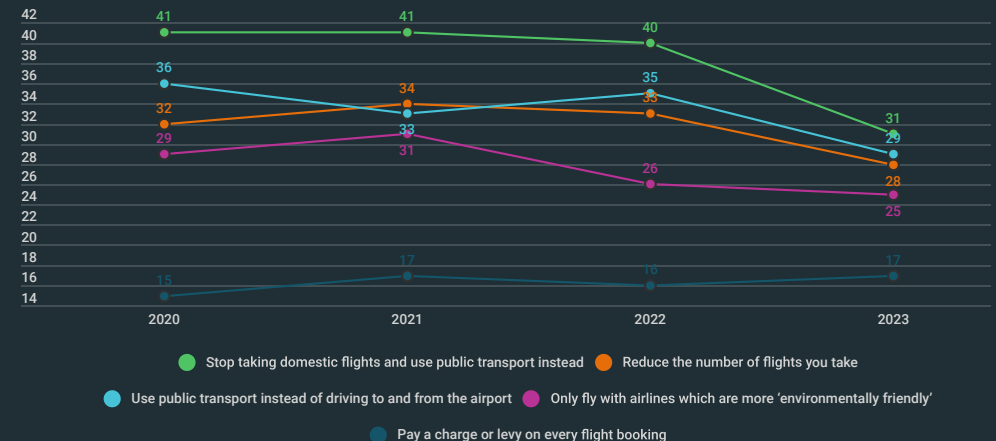
As aviation makes a post-pandemic comeback, people are **less likely** to say they have taken action to **reduce the environmental impact** of flights...

...And looking ahead, people are also **less prepared** to help reduce the environmental impact of the flights compared with last year

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



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



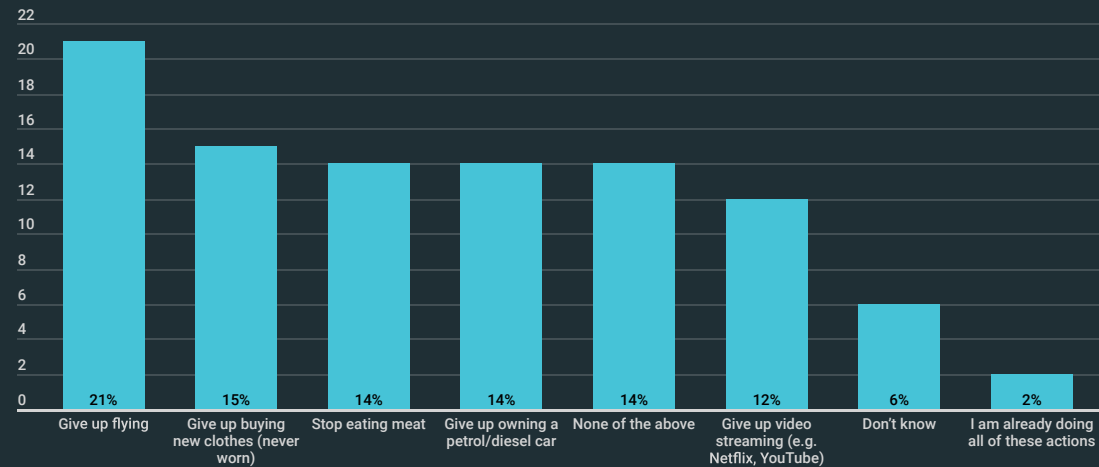
The public also seem less willing to help reduce the environmental impact of the flights they take in the future, with fewer willing to reduce the number of flights they take (28% vs 33%) and fewer willing to use public transport instead of driving to and from the airport (29% vs 35%), among other actions.

Sustainable aviation: shifting priorities?

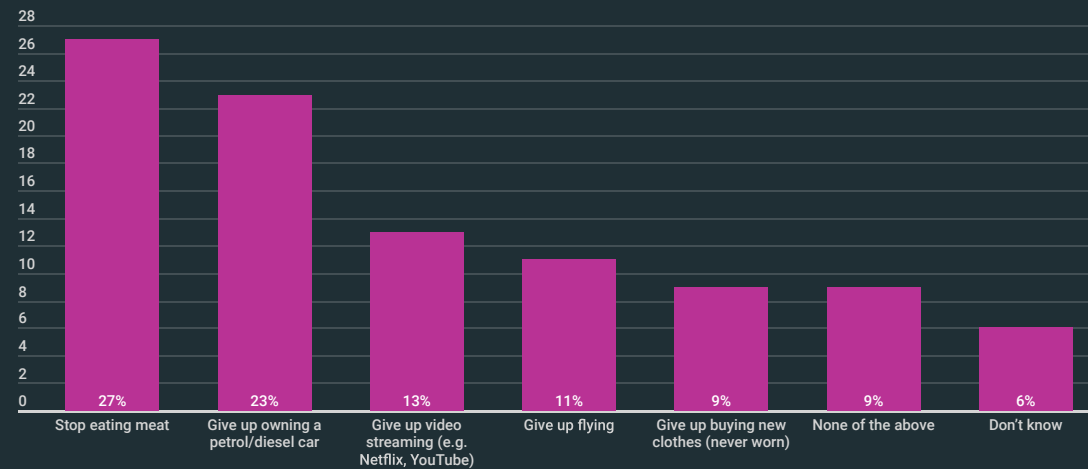
However, people are **more likely** to think **flying is easier** to give up than eating meat or streaming TV



What actions to fight climate change would be the easiest?



...And the hardest?



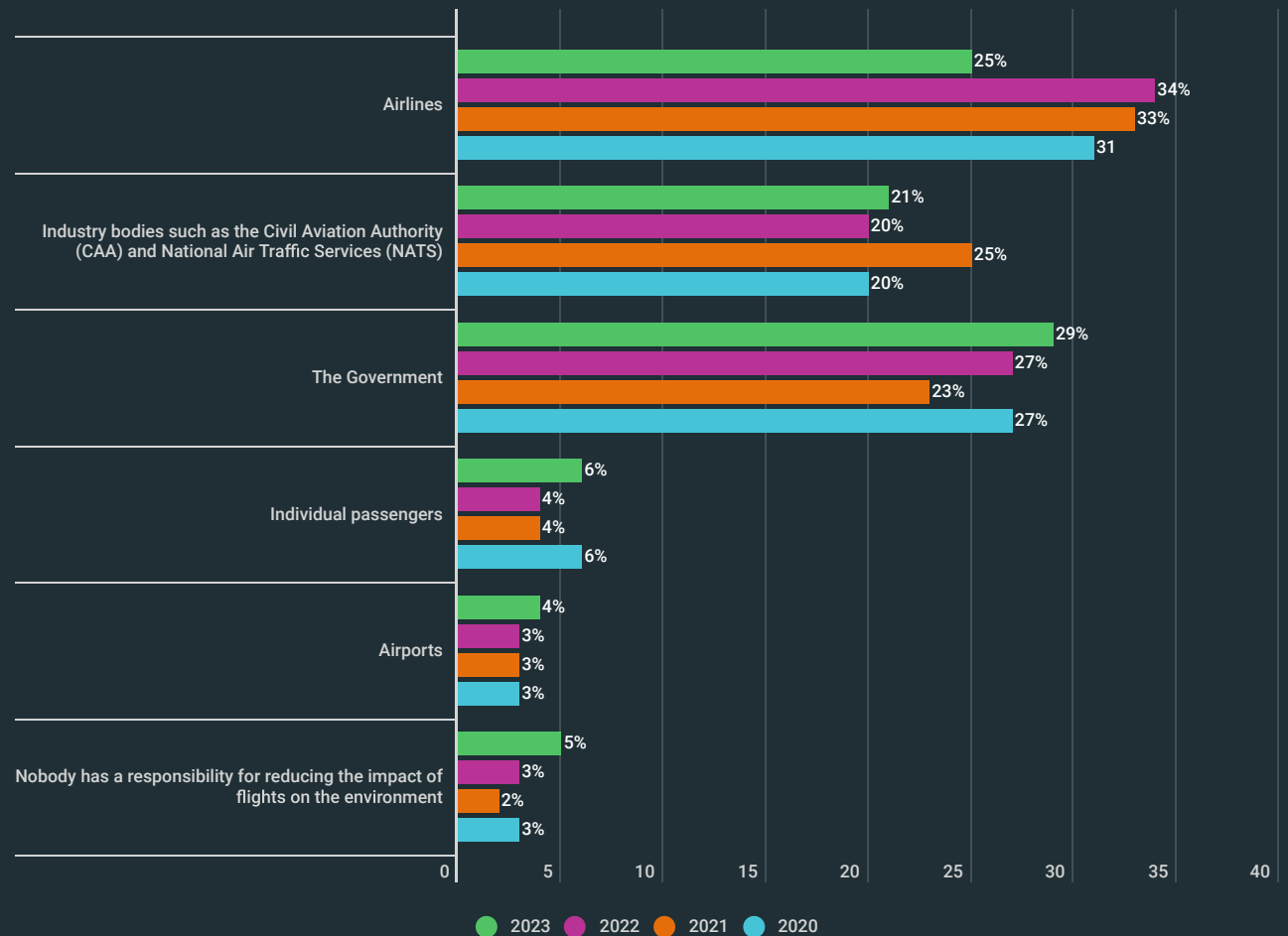
Sustainable aviation: shifting priorities?

For the first time, the Government is seen as most responsible for reducing aviation's environmental impact

Indicative of a fall in the measures tracking personal responsibility, for the first time the UK Government is seen as most responsible for reducing aviation's environmental impact (29%), and people are less likely this year than in 2022 to think that airlines should take most responsibility (25% vs 34%).

However, when asked how much different groups or bodies are doing to take action, the public are largely split. For example, 40% believe industry bodies are doing a 'great deal/fair amount', while a similar proportion (39%) think they are doing 'not very much/nothing at all'.

What actions to fight climate change would be the easiest?



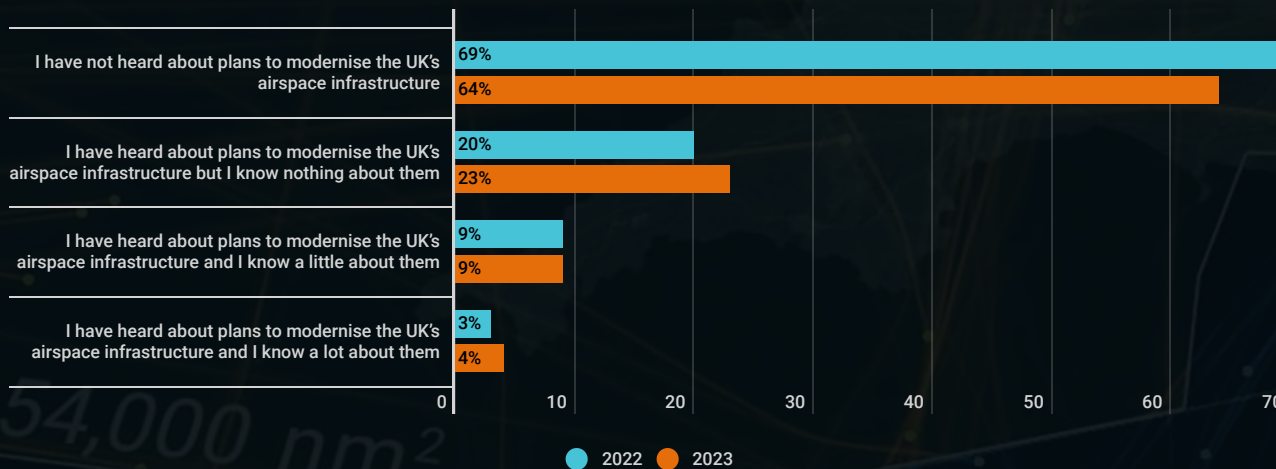
Airspace Modernisation and the future of flight

Awareness of airspace modernisation has **increased** slightly since 2022, though close to two thirds have not heard anything about it

Airspace – our invisible motorways in the sky – is the underpinning of the entire aviation industry. Vital to the safe operation of tens of thousands of flights every single day, it is an infrastructure relied on 24 hours a day, 365 days a year, to enhance the UK's global connections. But it is also in need of a radical transformation.

Much of the UK's airspace was designed in the 1960s and today doesn't allow aircraft to fly the most efficient and sustainable routes. In the past two years, NATS has recently delivered two major airspace modernisation projects, including the most technical and complex in history.

Which of the following best describes your knowledge of plans to modernise the UK's airspace infrastructure?

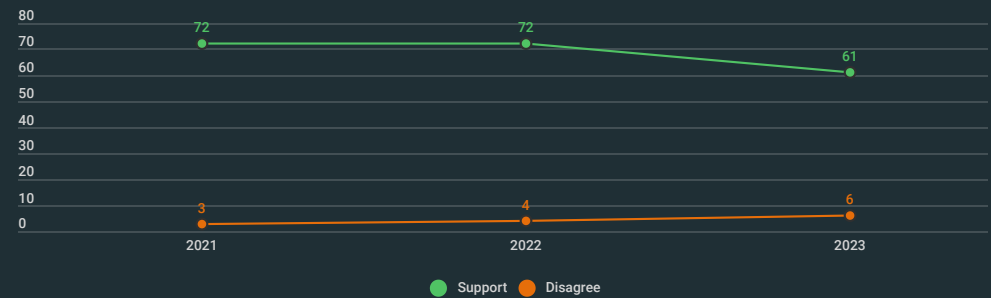


Airspace Modernisation and the future of flight

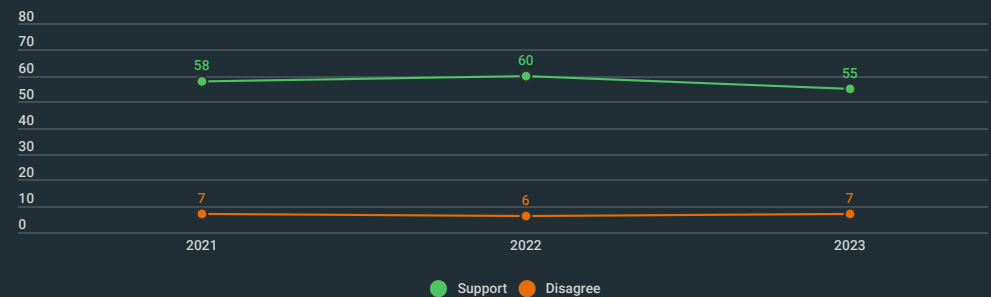
Support for **airspace modernisation** **strongest** if it reduces emissions and delays



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 CO2 emissions per flight?



To what extent do you support or oppose changes to flight paths if the likelihood of delays to flights is reduced?



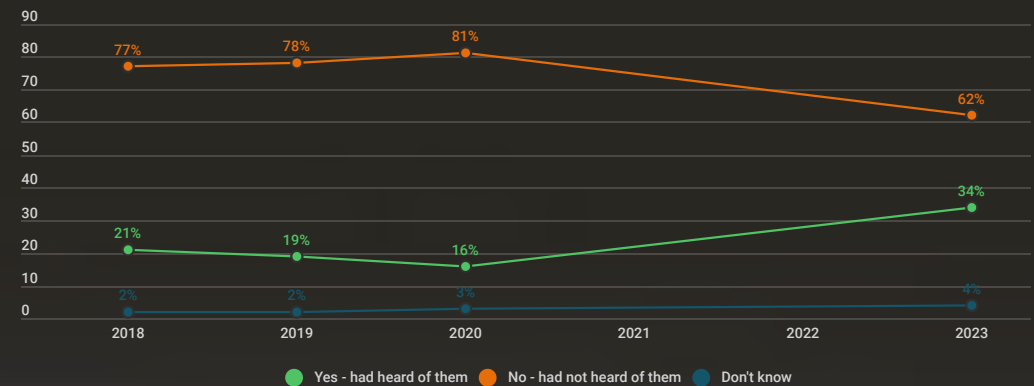
Airspace Modernisation and the future of flight

Awareness of Digital Control Towers has almost doubled since the pandemic

Awareness for digital control towers has grown significantly since 2018. Put simply, a digital tower is a way of incorporating cameras and screens into an airport's air traffic control operation in order to enhance performance and efficiency. This could be within an airport's existing control tower, or through the construction of a bespoke digital operations room, which is exactly the approach taken by London City Airport.

In 2021, London City became the first major UK airport to be controlled via a digital tower when its controllers moved from the airport to a new operations room in NATS' Swanwick control centre in Hampshire. Today, the airport's controllers manage air traffic via a panoramic video wall 80 miles away from the airport itself.

Before today, had you heard of digital control towers?



Airspace Modernisation and the future of flight

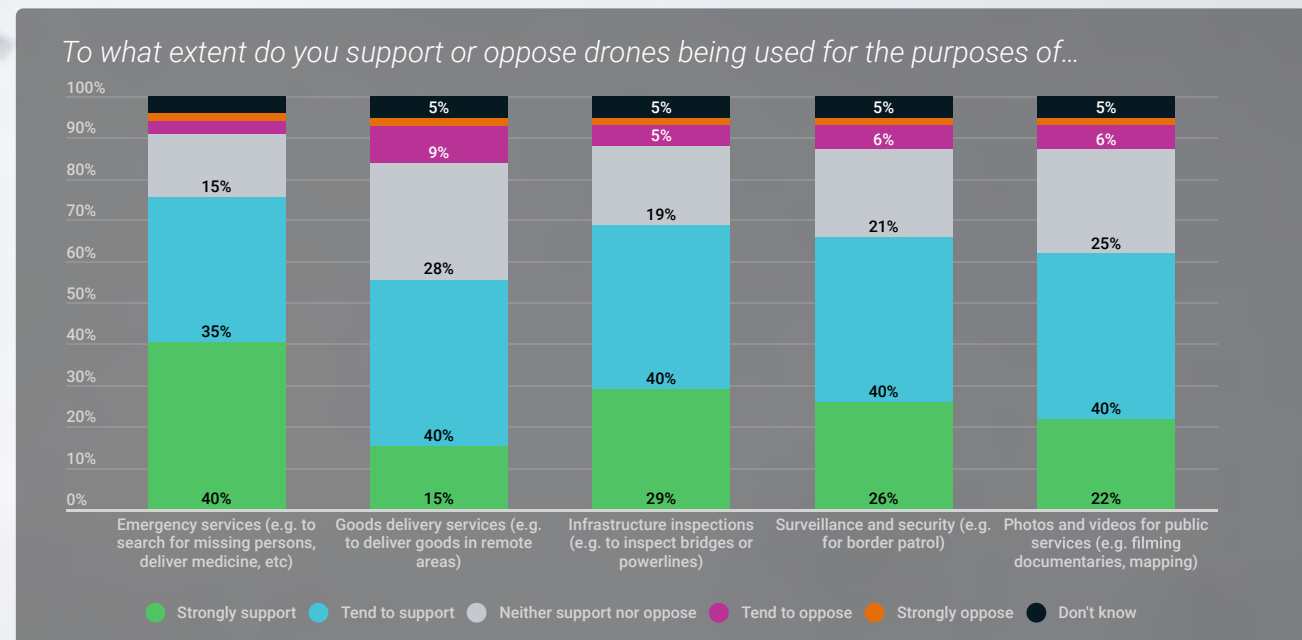
For the first time, the **majority support** for drone use for a range of different reasons

Five years on since drone sightings at Gatwick Airport disrupted 1,000 flights, the UK public are now broadly accepting of the wide use of drones - including those flown 'beyond visual line of sight' - for the first time.

Today, NATS is supporting a number of drone and advanced air mobility - or air taxi - projects across the UK, with a focus on safely integrating new types

of aircraft into our skies with minimum disruption to those already there in order to create a modernised, integrated, and sustainable future for our airspace.

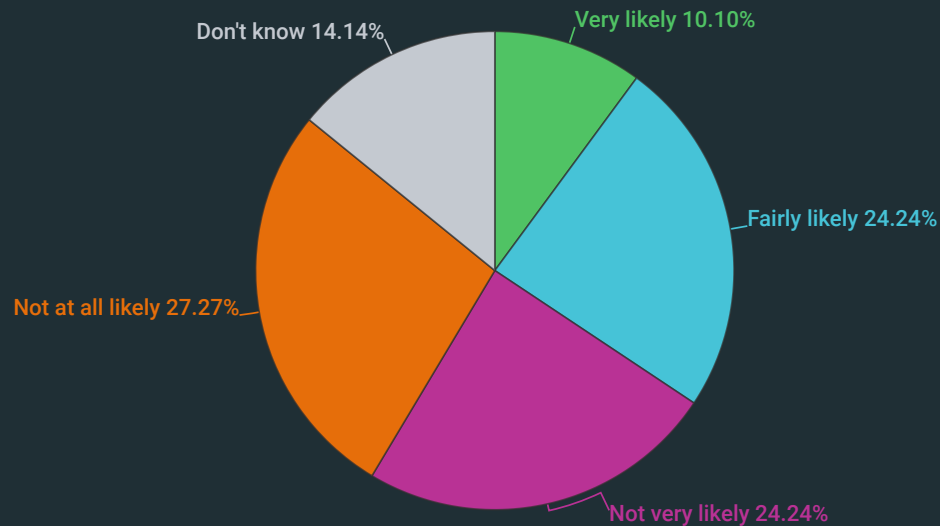
While the public remain sceptical about the future use of air taxis, given many operators expect to be able to start flying in the UK from 2025, it will be fascinating to track how perceptions change over the coming years.



Airspace Modernisation and the future of flight

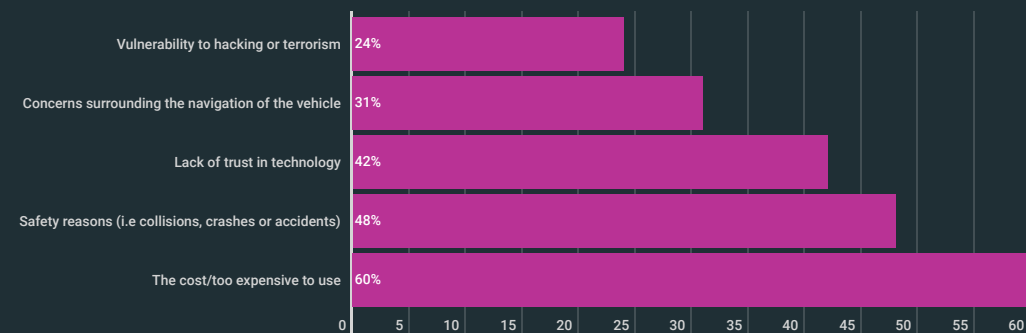
Half of the public would be **unlikely** to use a **flying taxi** if they were available

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



Perceived **costs** and **safety** the public's biggest concerns around 'air taxis'

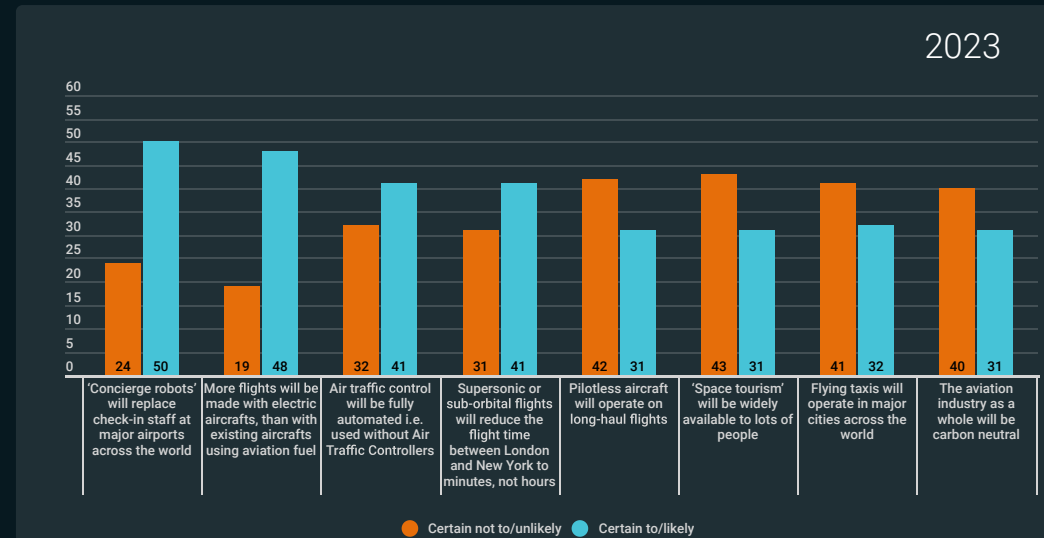
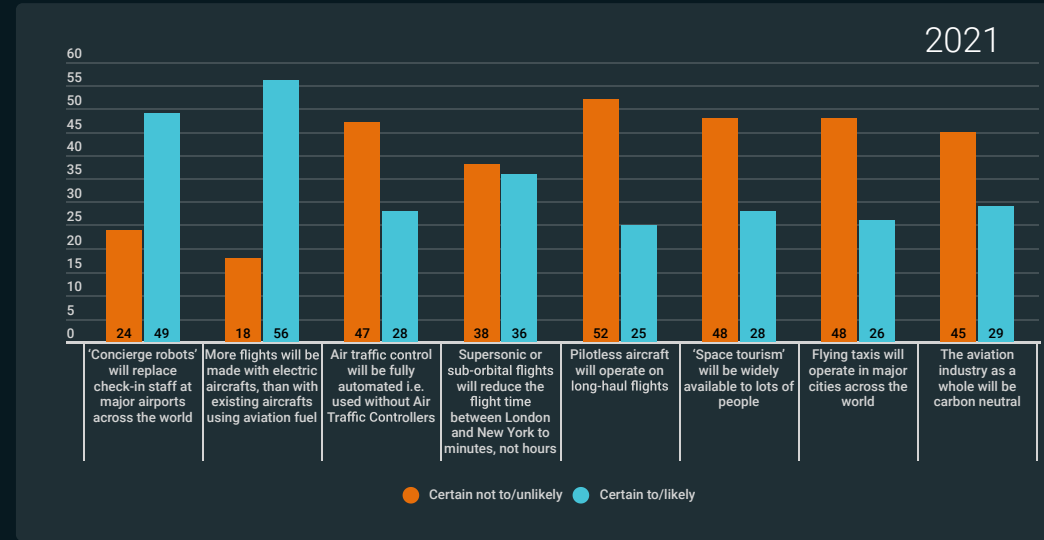
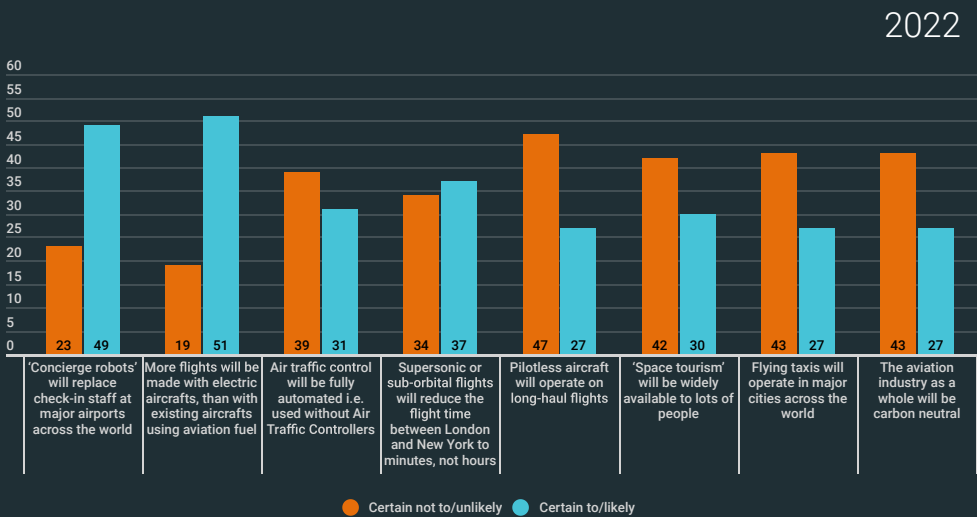
You said you would be unlikely to use a flying taxi if they were available to use in your city or area. What makes you say this?



Airspace Modernisation and the future of flight

And finally...a return to supersonic travel? More people think big technological changes are likely by 2050

How likely or unlikely do you think the following are to happen by the year 2050?



A note on fieldwork:

NATS commissioned independent researchers Ipsos UK to conduct a survey of the UK public to gauge their views on aviation – the NATS Aviation Index. Previous surveys were conducted in 2018, 2019, 2020, 2021, and 2022. This year's survey includes trend questions to recent travel habits, attitudes towards the impact of aviation on the environment and views about airspace modernisation and the future of aviation.

The research was conducted online through the Ipsos UK Online Panel. A total of 1,228 UK members of the panel, aged 18+ took part between 26 and 28 April 2023.

Quotas were set by age, gender, ethnicity and UK region, with final data also weighted to these profiles in order to generate a representative sample of the UK population.

You can download the full, tabulated results here

NATS