

The NATS logo is positioned in the top right corner of the page. It consists of the letters "NATS" in a bold, white, italicized sans-serif font. The background of the entire page is a dark blue night sky with several bright, curved light trails from aircraft, suggesting flight paths. In the bottom left, there is a silhouette of an airport terminal building with a control tower on top, illuminated from below. A tall, thin light pole stands in the middle ground, casting a bright glow. The overall scene is a night view of an airport with a focus on flight paths and infrastructure.


NATS

Aviation Index

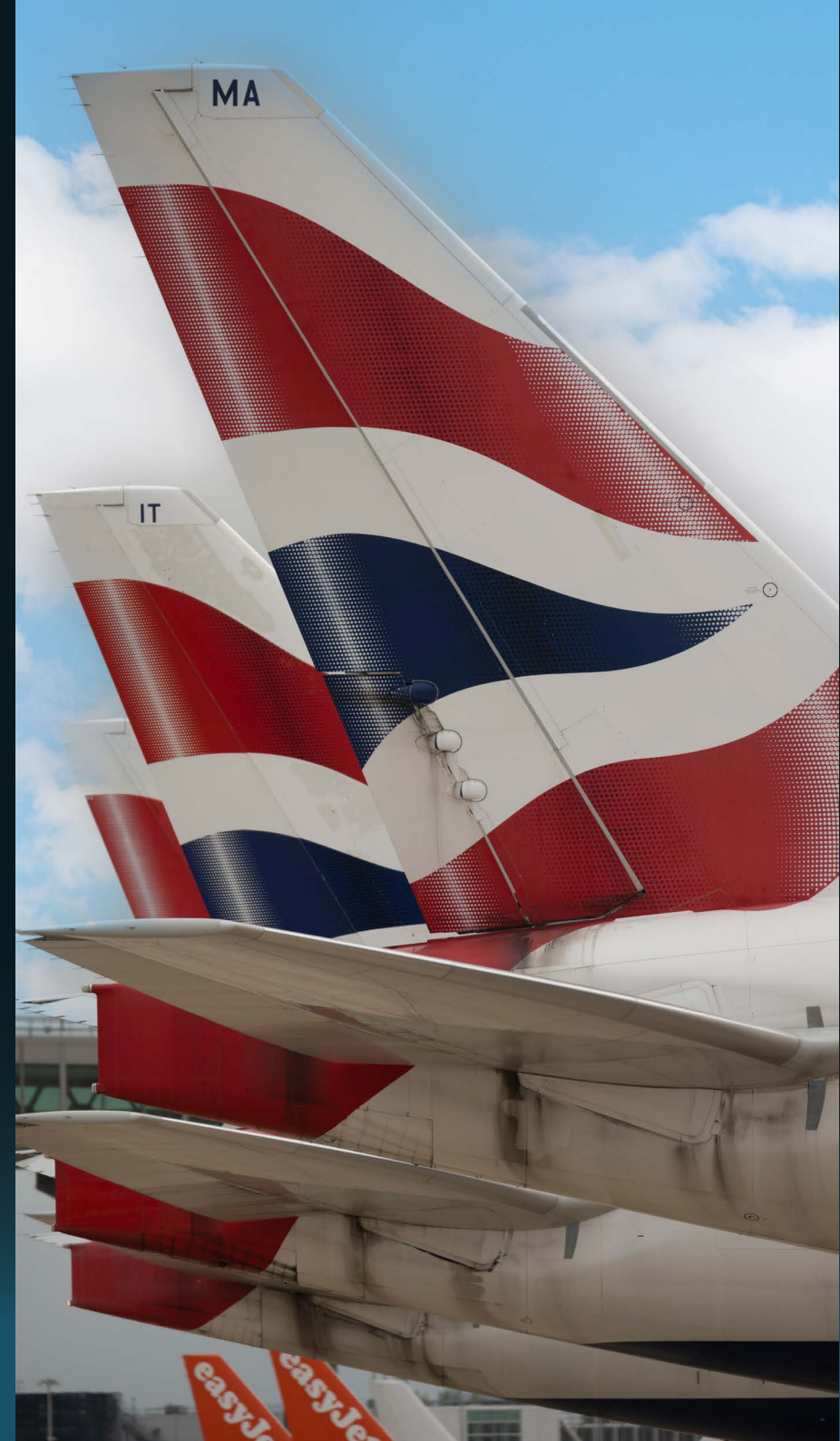
2022

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Introduction

This is now the fifth year that we've conducted the Aviation Index, our annual study of the public's attitudes and views on aviation. When we started in 2018, little did we know that we were cataloguing the calm before the storm.

The last two years have been unparalleled in the lives of most of us, and the aviation industry has been among those worst affected by efforts to slow the spread of the Covid-19 pandemic. Quarantine, isolation, face masks and vaccine passports are all measures that would have seemed unthinkable before 2020, but have since become a part of our lives. Through the Aviation Index, we've captured the public's attitudes, anxieties and priorities in a series of annual snapshots.

And now as the industry emerges from the shadow of Covid, restrictions begin to fall away and demand returns, we are seeing

new challenges as well as the re-emergence of old ones.

It is against that backdrop that we present the results of the Aviation Index 2022. The impact of Covid still looms large of course, as does the impact of the growing cost of living crisis, but longer-term priorities are also starting to reemerge. The industry's response to the existential threat of climate change, the effects of Brexit, rising ticket prices, the need (or otherwise) for airport expansion, airspace modernisation and the changing use of drones all feature.

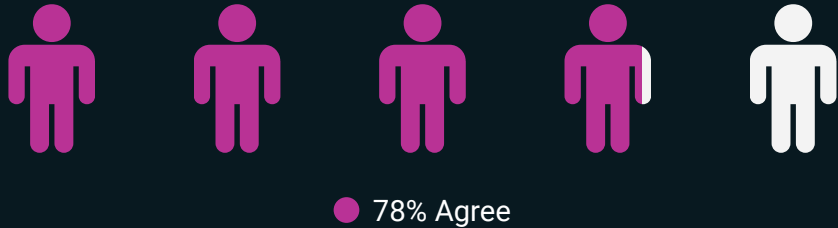
But in addition to all that, this year's Index is also a reminder that despite the industry's current challenges, the majority of people still love to fly and want to continue to do so. It's incumbent on us as an industry to ensure they can continue to do so in a way that's safe, efficient and ultimately sustainable.

A note on field work:

Each year NATS partners with the research specialists at Ipsos to produce the Aviation Index. Over 1000 members of the UK public – weighted to be representative of the wider population – give their views. Now with five years of evidence of changing trends and of an historic global pandemic, we hope it continues to be a source of value to the wider industry.

Attitudes to Flying: Come fly with me, again

Is aviation important to the UK economy?



As might be expected with a reduction in Covid restrictions, the proportion of people who flew in the last 12 months (26%) doubled compared with the same period in 2021 (13%), but is still well below pre-pandemic levels (55%).

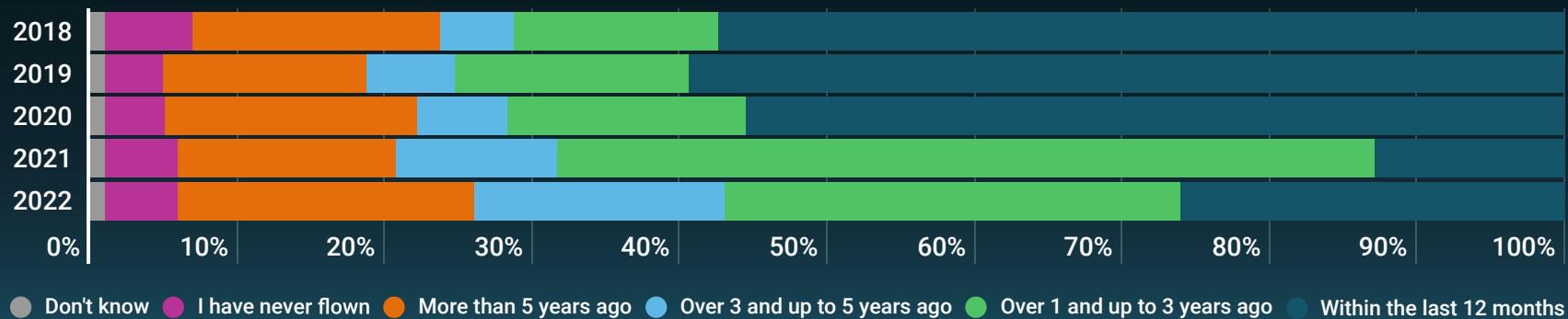
Is flying an enjoyable way to travel?



People are more comfortable this year with the idea of international travel – almost two in five (38%) said they were likely to book a leisure trip or holiday abroad in the next 3 months compared with 22% last year, and while the same proportion (40%) said they were uncomfortable with the idea of international travel, this has fallen from 62% last year.

When did you last fly?

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



Cost of living crisis eating into confidence

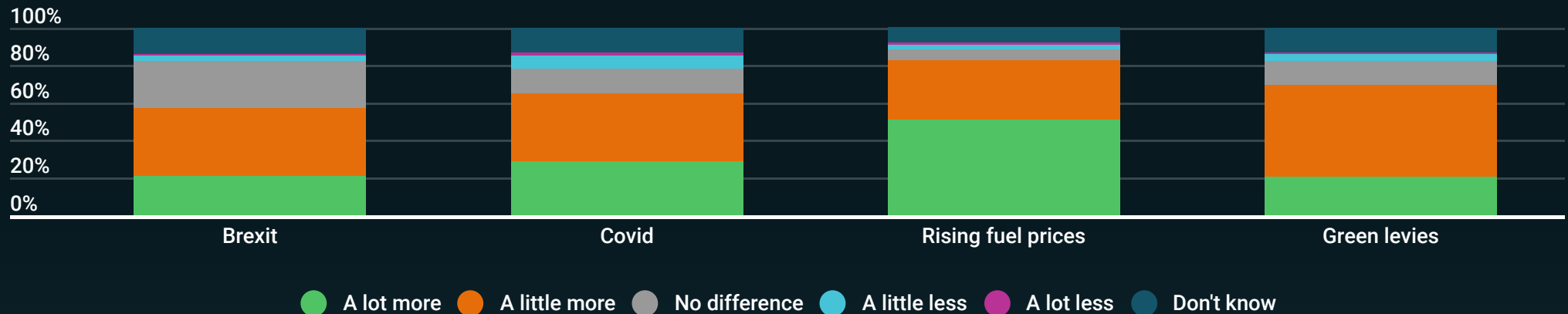
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proportion (40%) said they were uncomfortable with the idea of international travel, this has fallen from 62% last year.

Having said that, aviation remains a desirable mode of transport, with 63% of the public saying they enjoy flying, and a similar proportion (68%) agree that flying nowadays is safer than it has ever been.

What has made flying more or less expensive?



57%

Over half think Brexit has increased the cost of flying



3%

Only 3% think Brexit has led to lower fares

Covid bounce-back

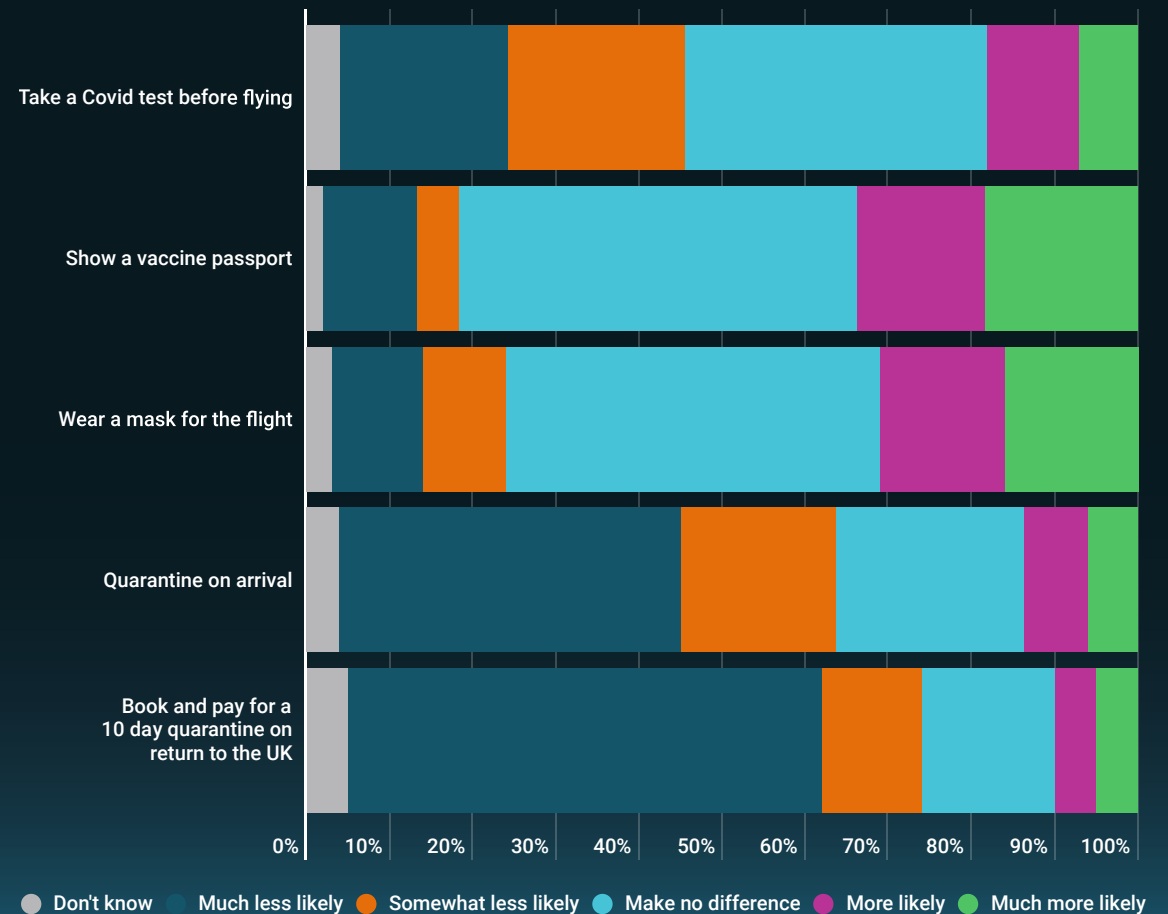
Though the public is more optimistic about travelling abroad this year, a return to quarantine could significantly impact travel prospects.

Our results last year showed quarantine was the single biggest deterrent to travel, a trend that continues in 2022 with the majority saying they would be discouraged from flying if they had to quarantine on arrival (61% and up 8 percentage points on 2021), or if there was a return to the policy that saw travellers having to book and pay for a 10-day quarantine hotel package (69%).

However, many feel they are more likely to travel if asked to show a vaccine passport (34% and down 10 points on 2021) or wear a mask while flying (31%, down 5 points).

Quarantine remains biggest travel turn-off

How much more or less likely do you think you would be to fly abroad by commercial airline this year if you are asked to do each of the following?



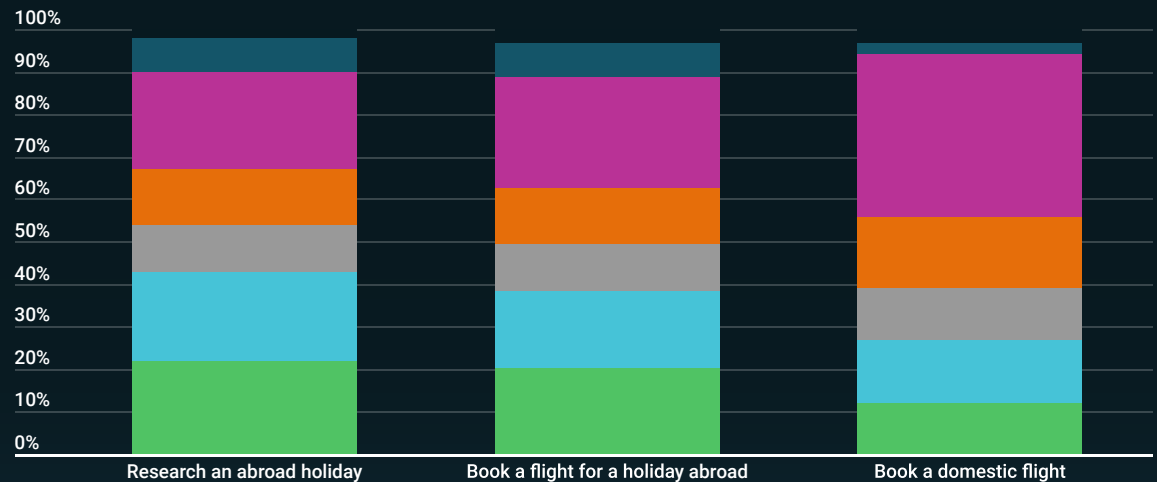
Covid bounce-back

But people are **much more likely** to fly this year

As you might expect, people are more likely to be taking or at least researching taking a flight this year, with 38% saying they are likely or very likely to book a trip abroad, a figure that's 16% higher than for the same period last year. Younger adults in particular are more likely to fly abroad regardless of any Covid restrictions in place, underlining their determination to get away after recent restrictions.



How likely or unlikely do you think you are to do each of the following within the next 3 months?



38% The percentage of people who said they were likely to book a flight this year, **up 16 points** compared to 2021

Tackling the climate crisis

We know climate change represents an existential threat to us all. Modernising our airspace and the introduction of new technologies that improve the efficiency of air traffic operations are key to cutting fuel burn and emissions in the short term. Last year NATS introduced the UK's largest ever airspace change, which will save enough CO2 to power 3,500 homes. But it's clear there is much more to do, and the public rightly see it as an absolute priority.

Most people believe emissions reduction is the top priority for the aviation industry. At 62%, this is twice as much as the next listed priority, reducing

Reducing
emissions still
leads the way

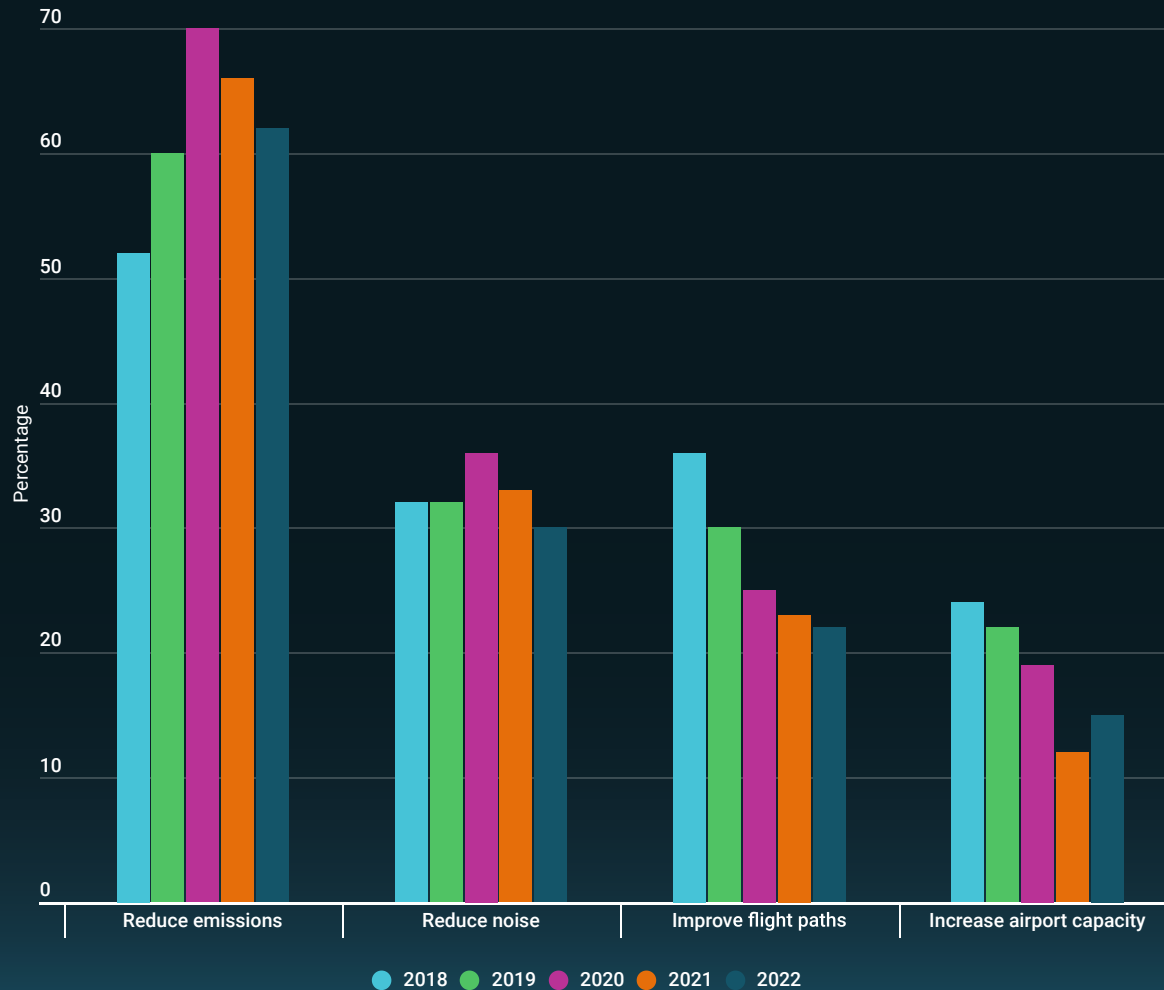
noise (30%); the respective figures in 2021 were 66% and 33%. There is also appetite for prioritising investment in greener technology such as fully electric or hydrogen powered commercial aircraft - 71% - a statistic that has not changed since last year.

Overall, findings from this year's Index suggests that, while the public do feel there is an urgent climate imperative, there is strong appetite for post-Covid travel.



Tackling the climate crisis

What should the industry prioritise for improvement?



Perhaps because aviation is such a visible source, the public tend to overestimate the impact of emissions from air travel relative to other factors in causing climate change. Over half believe it contributes more than 10% of global emissions against the true figure of closer to 2%.

Sentiment has also weakened slightly on whether people should be discouraged from flying if they want to. The public are now more likely to agree that people should not be put off, should they wish to fly commercially (35% vs. 28%).



40%

The percentage of people who said they are prepared to stop taking domestic flights to be more environmentally friendly

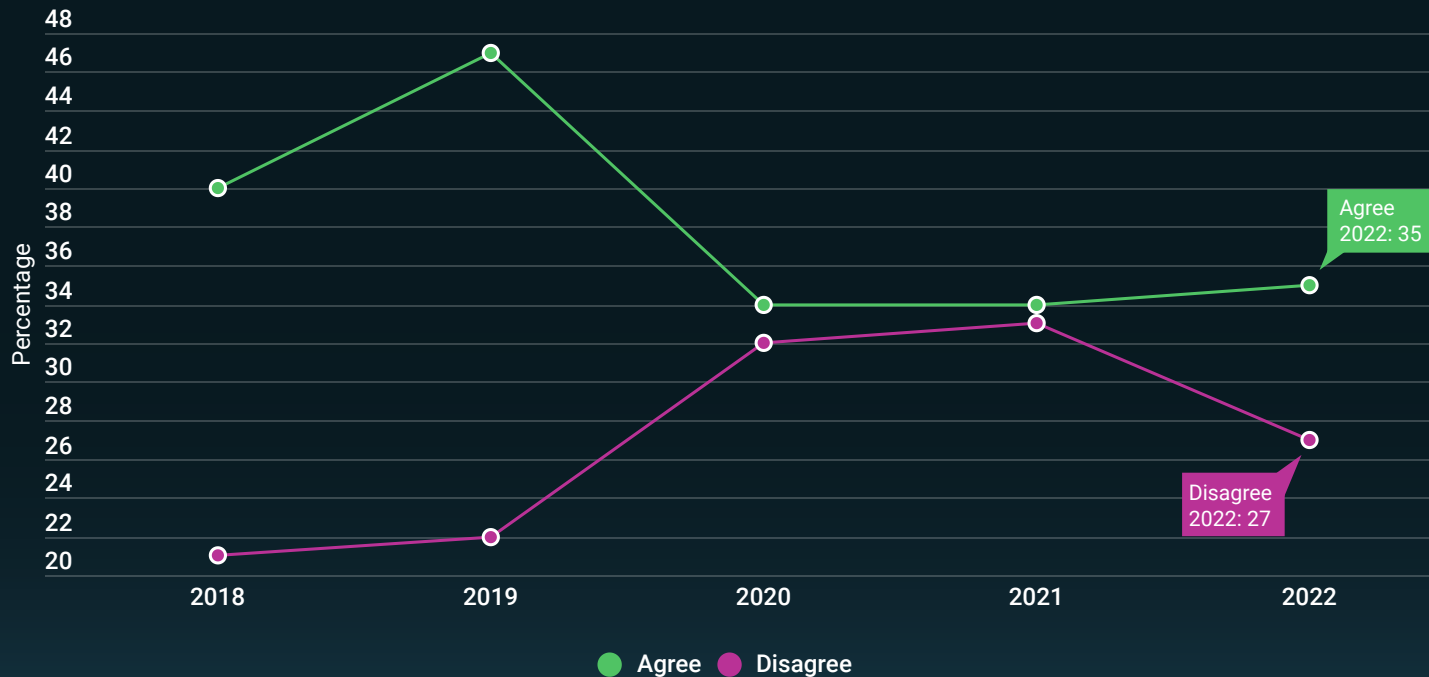


33%

The percentage of people saying they're prepared to cut the number of flights they take to be more environmentally friendly

The gap reopens on whether flying should be actively discouraged

I don't think people should be discouraged from flying due to the environmental impact



Who should take responsibility?

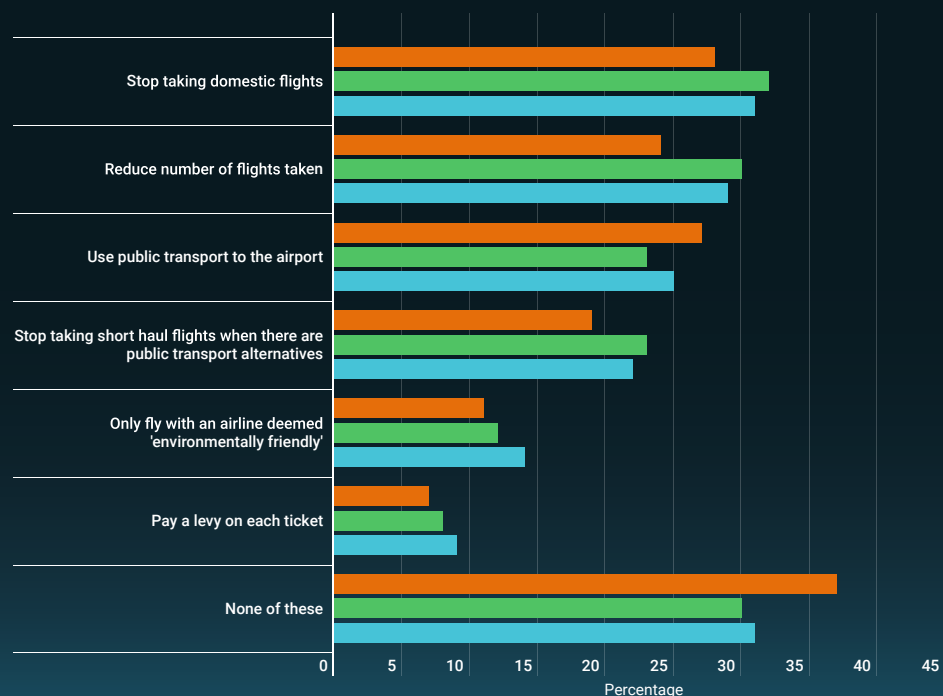
The public believes airlines, the Government and industry bodies like NATS should take most responsibility for reducing the impact of flights in the UK, though people are more likely this year than last to think the Government should be most responsible (27%, up from 23% last year), switching places with industry bodies 20%, down from 25%).

Just 4% think individual passengers should take most responsibility, and 3% for airports, as in 2021.

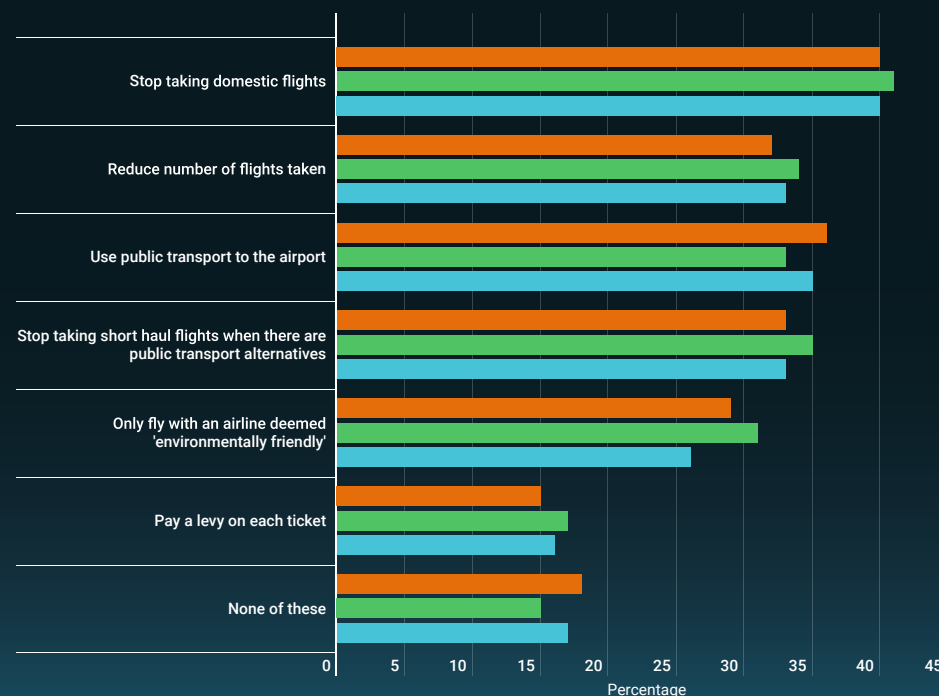
Similarly, the 'say-do' gap remains for things people are doing, and can do, to reduce their environmental impact from a travel perspective. There has been little movement on things people say they have done to reduce their environmental impact; in fact the proportion who said they would be willing only to fly with environmentally friendly airlines has fallen, from 31% to 26%, highlighting the gap between public attitude and actual behaviours where flying is concerned.

Which, if any, of the following are you already doing or would be prepared to do to help reduce the environmental impact of flying?

What people are doing:



What people would be prepared to do:



● 2020 ● 2021 ● 2022

Noise and the future of airspace

Together with carbon emissions, the impact of noise is the industry's other great vice.

Plans to transform UK airspace - changes that will make a significant contribution to the industry achieving net-zero by 2050 - also come with technology changes that could result in aircraft flying in more concentrated routes, the noise impacts of which need to be carefully weighed.

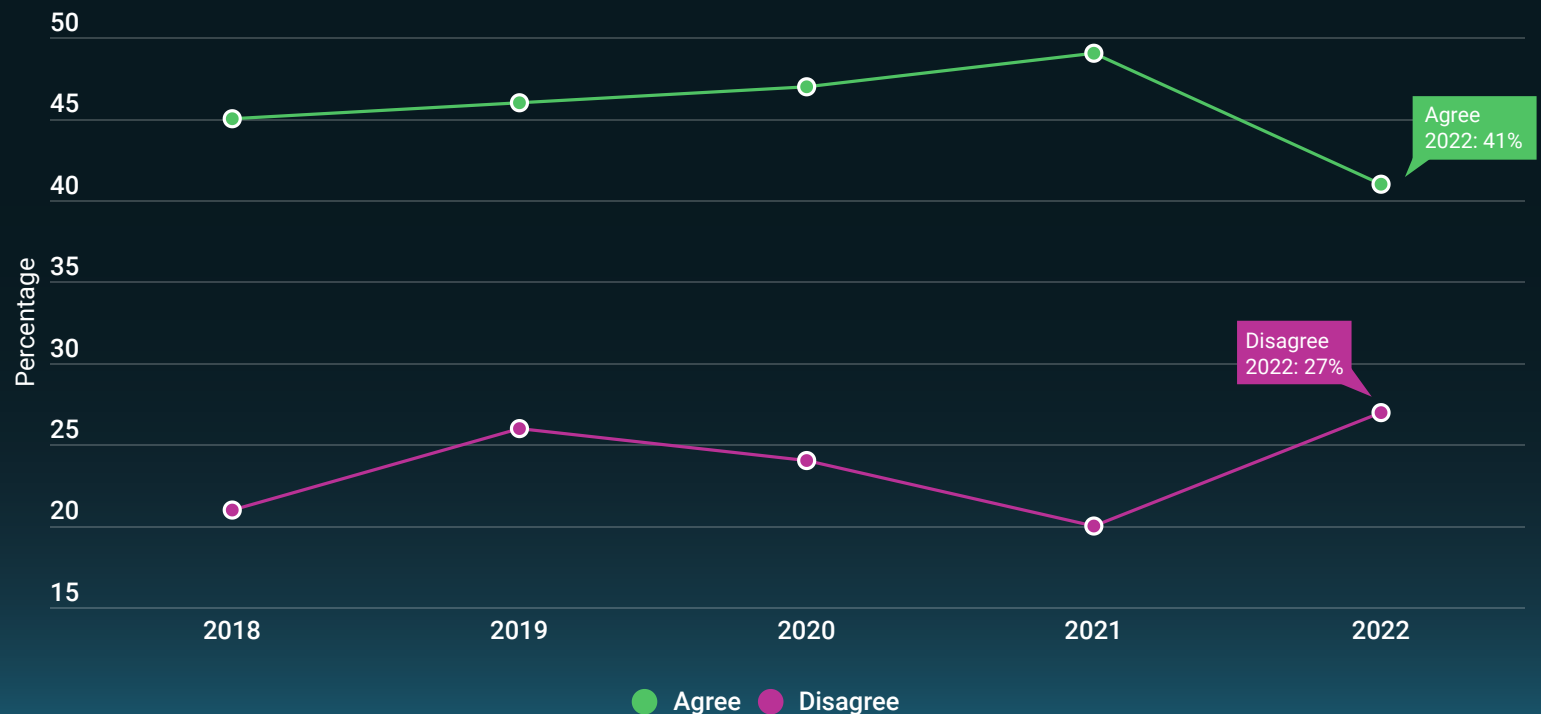
It's a balance the public recognise when asked to consider whether flights should avoid residential areas.

Noise or emissions?

Among the three in four who say aircraft fly overhead (for most this is infrequently), 13% say it bothers them a great deal or fair amount.

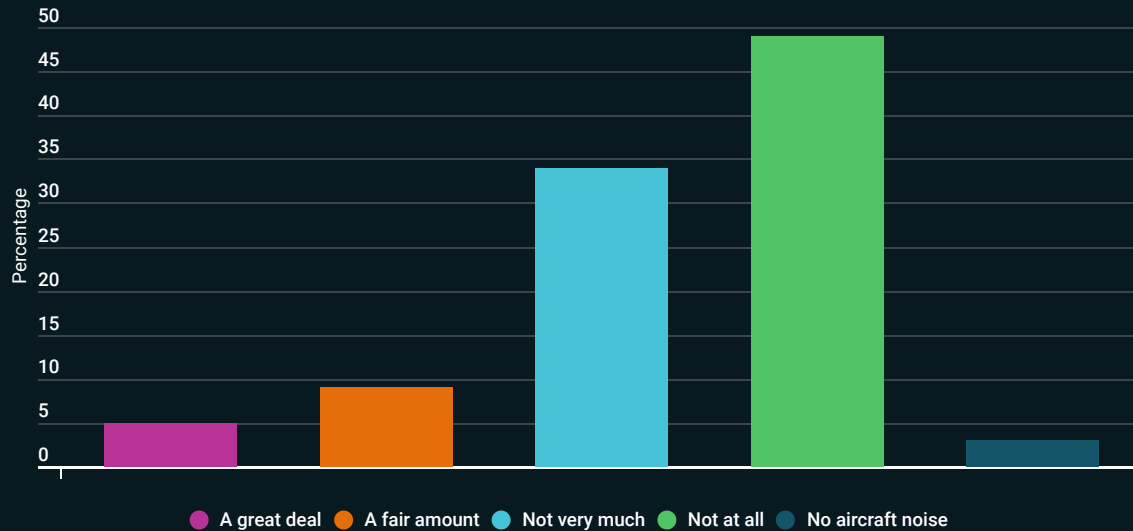
Londoners are more likely to say they are bothered by aircraft noise, perhaps reflecting the higher concentration of airports in and around the capital.

Flight paths should avoid residential areas as much as possible, even if this means they take longer to arrive at their destination, use more fuel and produce more CO2



Does aircraft noise bother you?

To what extent, if at all, does noise from planes bother you where you live?

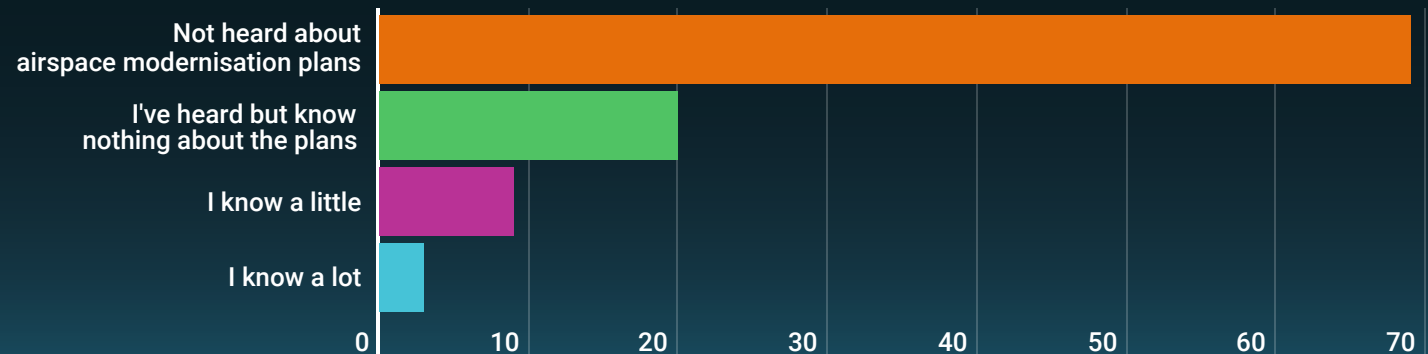


Awareness of airspace modernisation itself is low – 69% haven't heard of the plans, 20% have but currently know nothing about them. However, support for changes to flight paths is slightly higher this year, up five percentage points to 47%.

Environmental improvements remain the most convincing argument in favour of the changes, although fewer people say they support changes if it means new residential areas are located under flight paths for the first time.



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



Environment key to support for airspace modernisation

Environmental improvements remain the most convincing argument in favour of the changes, while fewer people say they support the changes if it means new residential areas are located under paths for the first time.

Interestingly, 45% of opponents to airspace modernisation are won over if changes were to reduce aviation's impact on the environment by reducing CO2 emissions per flight.



45%

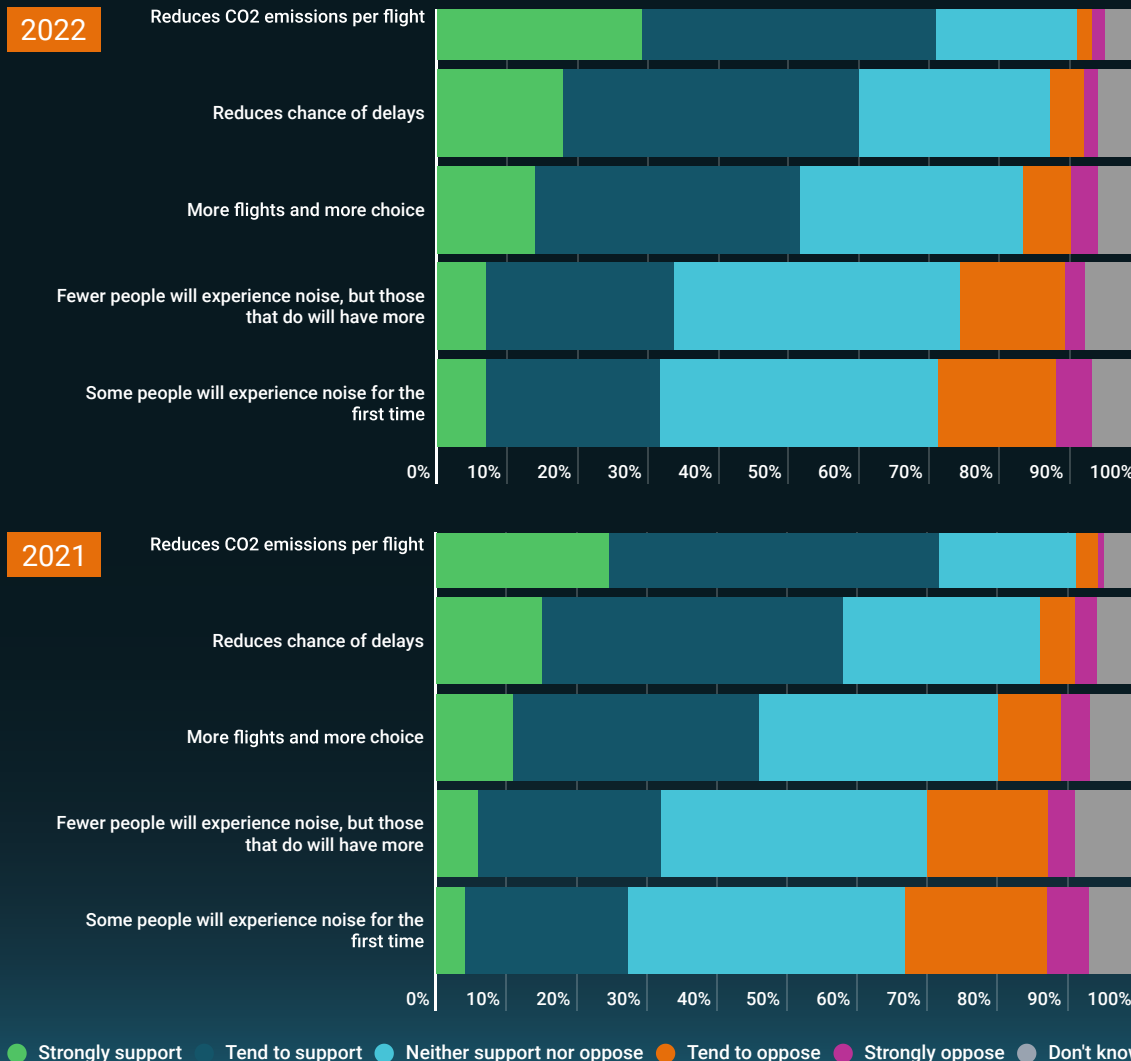
The percentage of opponents in principle who are 'won over' if changes reduce aviation's impact on the environment by reducing CO2 emissions per flight



33%

The percentage of supporters who become opponents if residential areas become overflow for the first time

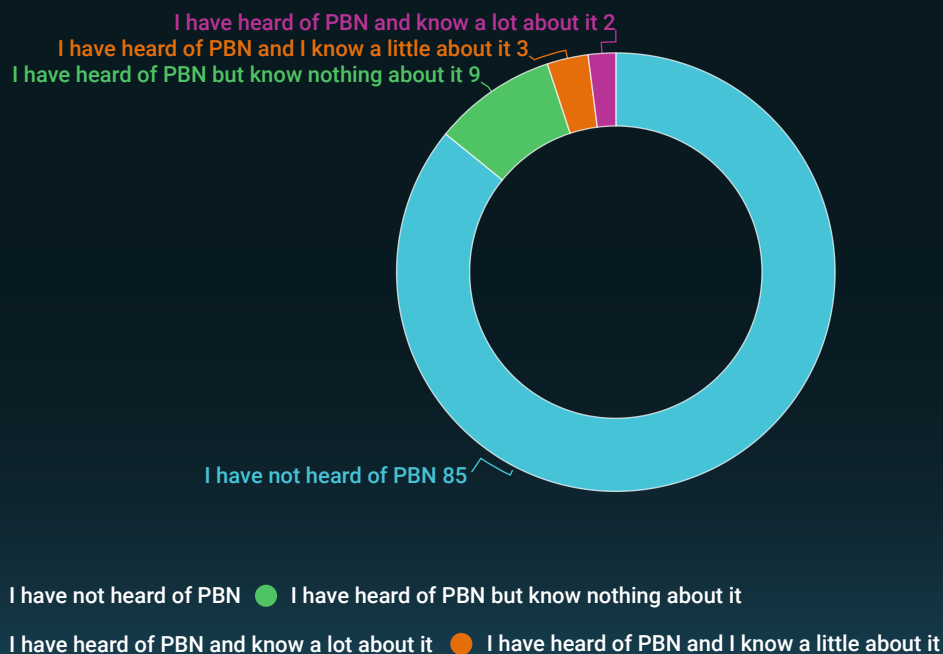
And to what extent do you support or oppose changes to flight paths if this means that...



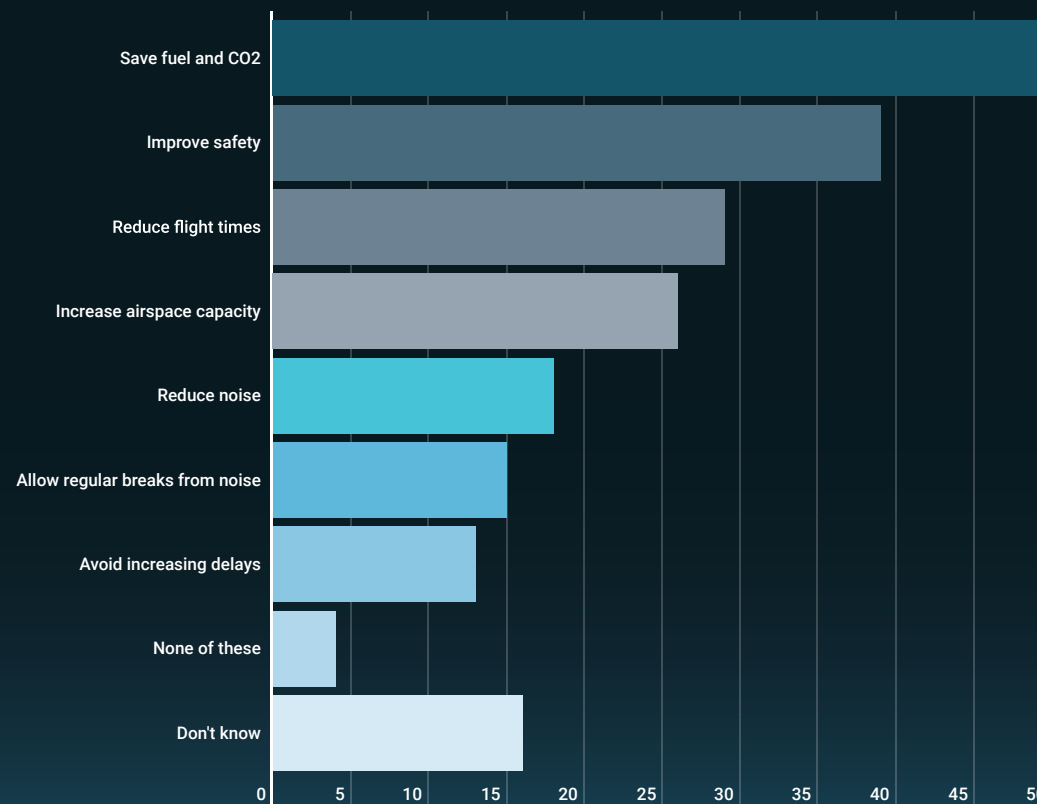
Environment key to support for airspace modernisation

The majority (85%) had not heard of Performance-based Navigation (PBN) – one of the key technologies that allows for more optimised operations - before the survey, but when the concept was explained, around half (49%) said they were favourable towards the concept, with only 7% unfavourable.

The most convincing arguments put forward for PBN relate to the environment again (50%), but also safety (39%) with reduced flight times (29%) and increasing airspace capacity (26%).



Which two or three benefits of Performance Based Navigation do you find most appealing?



A look to the future

Together with carbon emissions, the impact of noise is the industry's other great vice.

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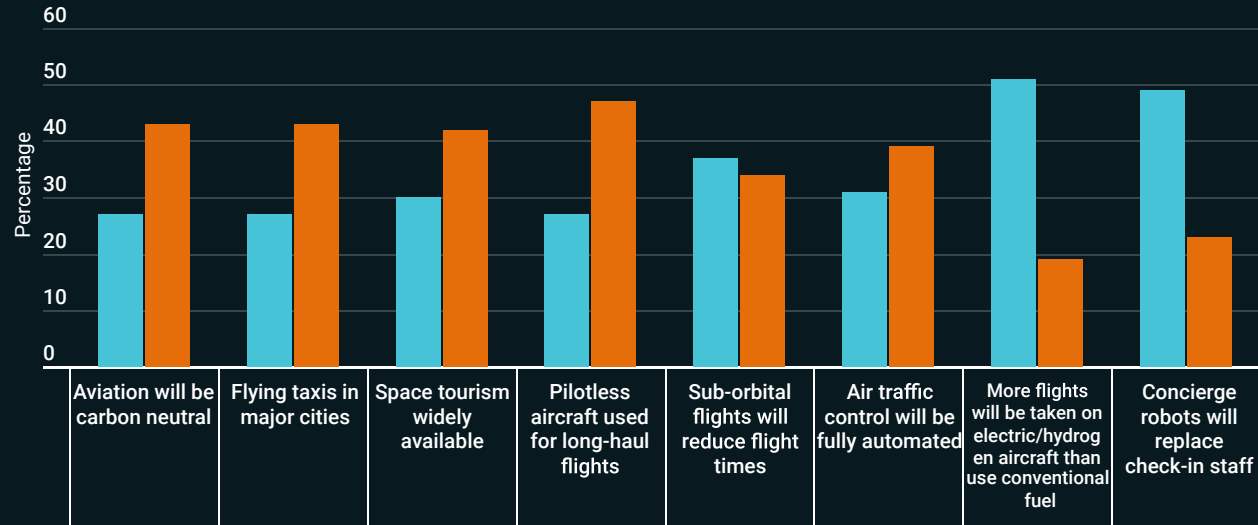
However, with active work underway on the **use of air taxis in the UK** – in which NATS is playing a part – 2050 may actually arrive sooner than some people think



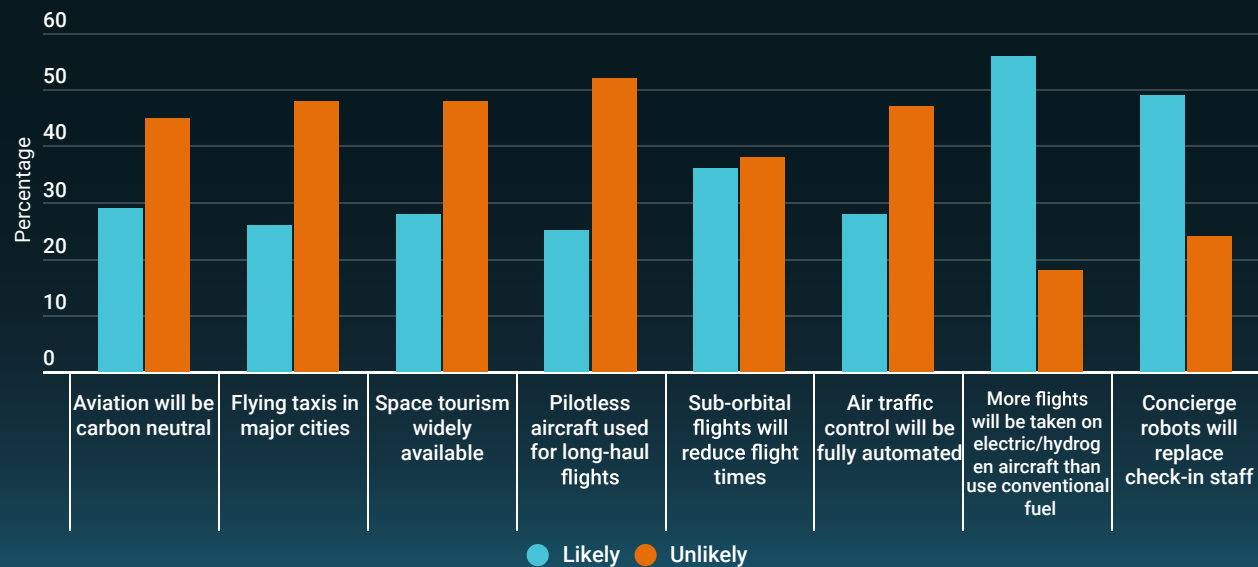
A look to the future

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

2022



2021



Field work

NATS commissioned independent researchers Ipsos 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 has returned to its usual length, after a shorter survey in 2021, and includes trend questions to understand how views have changed over time, as well as questions focused on the effects of the COVID-19 pandemic on opinions about travel and the aviation industry. It also includes a section exploring public attitudes on Performance Based Navigation (PBN).

The research was conducted online through the Ipsos Online Panel. A total of 1,000 UK members of the panel aged 18+ took part between 17 and 22 March 2022.



NATS

nats.aero
info@nats.aero

