

Aviation Index **2026**

Public perceptions and priorities

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Executive summary

The NATS 2026 Aviation Index has found that the UK public continues to value aviation as an essential contributor to economic growth and global connectivity. While environmental considerations remain very important, public priorities are still focused on improving the performance, reliability and resilience of the aviation industry.

Commercial aviation remains a central part of everyday life for most people. Almost all UK adults (94%) have flown commercially at some point, while over half (55%) have flown within the past 12 months – the highest level recorded since before the COVID-19 pandemic in 2020.

As in the 2025 Aviation Index report, ensuring reliable journeys is the public's foremost priority for the aviation industry. Nearly two-thirds (64%) say ensuring flights arrive and depart on time should be prioritised for improvement, making it the highest-ranked issue facing the sector among the aspects considered and placing it ahead of reducing emissions (55%). This points to a growing public expectation that aviation should deliver a more dependable travel experience.

There is recognition that delivering these improvements will require modernisation of the UK's aviation infrastructure. Most people agree that airport expansion cannot happen without airspace modernisation (68%) while public support for changing flight paths to enable a more efficient airspace system remains stable at 51%.

There is continued support for ambitious environmental goals from the public but they favour solutions that reduce emissions

through innovation, technology and smarter operations. Two-thirds (66%) agree that the aviation industry should prioritise investment in greener technologies, while support for measures that directly restrict flying has weakened.

Artificial intelligence (AI) remains a prominent topic across the transport and travel sectors with views varying widely depending on how it is used. There is increasing support for applications that improve customer experience. Around two-thirds (67%) are comfortable with AI providing information to passengers at airports. However, confidence remains closely linked to human oversight and safety assurance. Trust, accountability and safety are still essential for the adoption of new technologies. More than three-quarters (76%) would be uncomfortable with AI managing air traffic control without oversight from a human controller.

These findings point to a UK public that is pragmatic, forward-looking, and mainly aligned with the need for change. There is clear support for modernising aviation in a way that improves reliability, delivers environmental progress, and sustains the UK's position as a leading global aviation hub.

Background

The aviation sector remains a cornerstone of the UK's economy and global connectivity, enabling trade, tourism, and international business while supporting millions of journeys each year. As demand for air travel continues to recover from the COVID-19 pandemic, people expect aviation to deliver reliable, efficient and resilient journeys while continuing to support economic growth and international connectivity.

Alongside these expectations, the sector faces several long-term challenges and opportunities. Improving operational performance, reducing environmental impacts and accommodating future demand will require continued investment in infrastructure, technological innovation and the modernisation of the UK's aviation system. Understanding public attitudes towards these issues is essential to ensuring that industry strategies, policy decisions and infrastructure investments reflect societal expectations and maintain public confidence.

Since 2018, NATS has commissioned Ipsos to conduct the Aviation Index: an annual study exploring the UK public's perception of aviation. This long-running research provides a robust, evidence-based understanding of how they view aviation's role, challenges, and future direction. The 2026 edition builds on this foundation, offering insight into how attitudes are shifting in response to a rapidly changing aviation landscape.

Objectives

The Aviation Index 2026 was designed to:



Understand recent travel behaviours and attitudes towards aviation in the UK.



Explore public perceptions of aviation's economic value and role in supporting UK connectivity.



Assess public priorities for the aviation sector, including operational performance and resilience.



Measure awareness of and support for airspace modernisation and wider system reform.



Assess attitudes towards aviation's environmental impact and the industry's response.



Evaluate openness to future technologies, including drones, advanced air mobility, and artificial intelligence.

Scope

The 2026 Aviation Index maintains consistency with previous surveys (2018–2025) by repeating core questions, enabling meaningful year-on-year comparisons and long-term trend analysis.

In addition, the 2026 study introduces new areas of focus, including:

- ▶ Deeper exploration of public attitudes towards artificial intelligence in transport
- ▶ Expanded understanding of perceptions of modernisation and system performance
- ▶ Updated insight into attitudes toward emerging aviation technologies

This combined approach ensures the report identifies long-term shifts in public opinion while capturing emerging attitudes towards new technologies, policy priorities and the future of aviation.

Methodology

The research was conducted by Ipsos using its online panel. A total of 1,220 UK adults aged 18+ took part in the survey, which was carried out between 17 and 21 April 2026.

Quotas were applied by age, gender, ethnicity and region to ensure broad representation of the UK population aged 18+. Data were subsequently weighted to reflect the demographic profile of UK adults.

Where relevant, statistically significant differences from the 2025 results are highlighted throughout the report, enabling clear comparison of how public attitudes are evolving over time.

Aviation remains vital to the UK's economy and connectivity



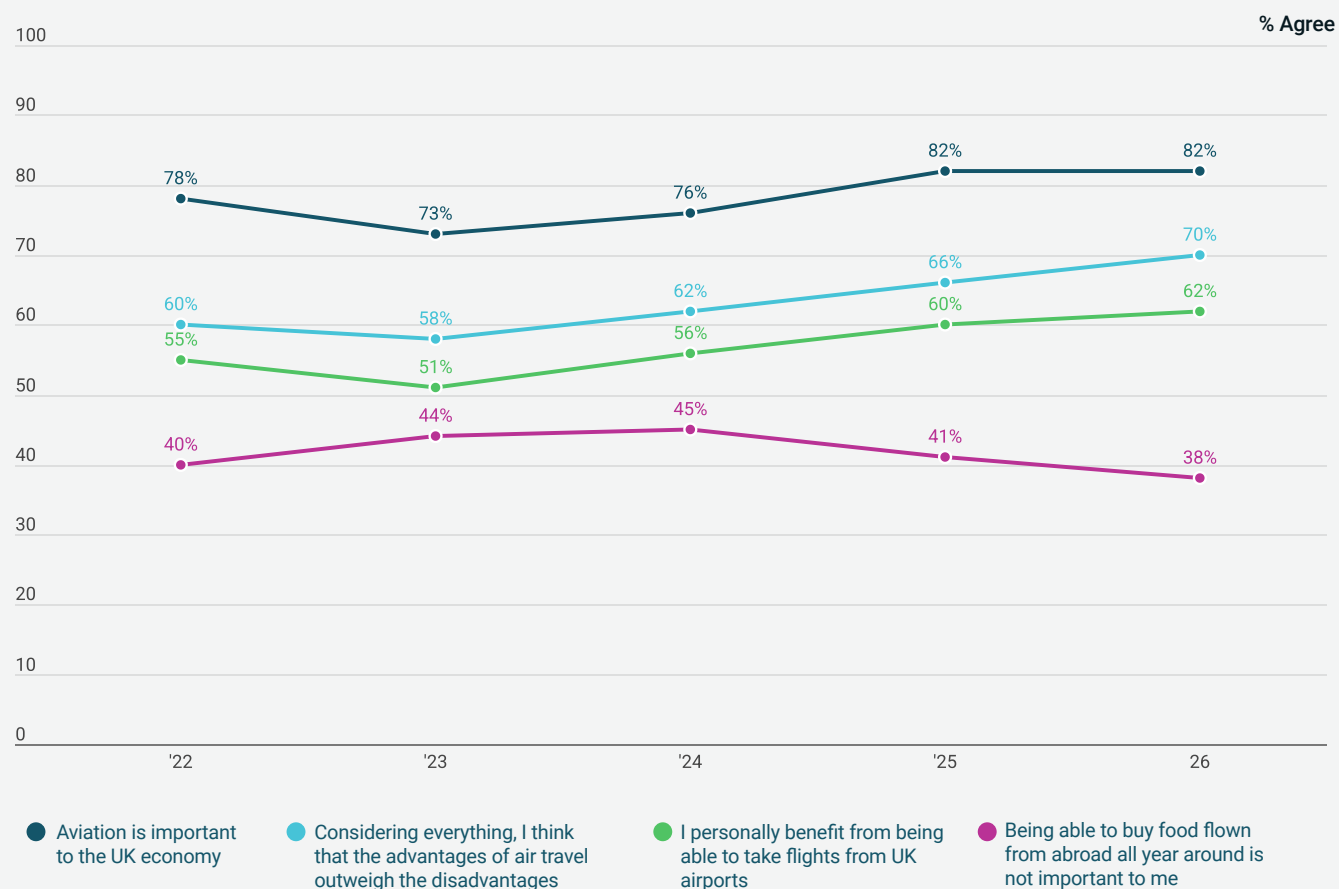
Aviation remains vital to the UK's economy and connectivity

The 2026 Aviation Index confirms that the public recognises aviation as an important driver of economic growth and national connectivity. Most UK adults (82%) agree that aviation is important to the UK economy, while 90% recognise its contribution to maintaining the UK's position as a globally connected nation. People see value in flying, with most agreeing that the advantages of air travel outweigh the disadvantages (70%), and that they personally benefit from flights departing from UK airports (62%).

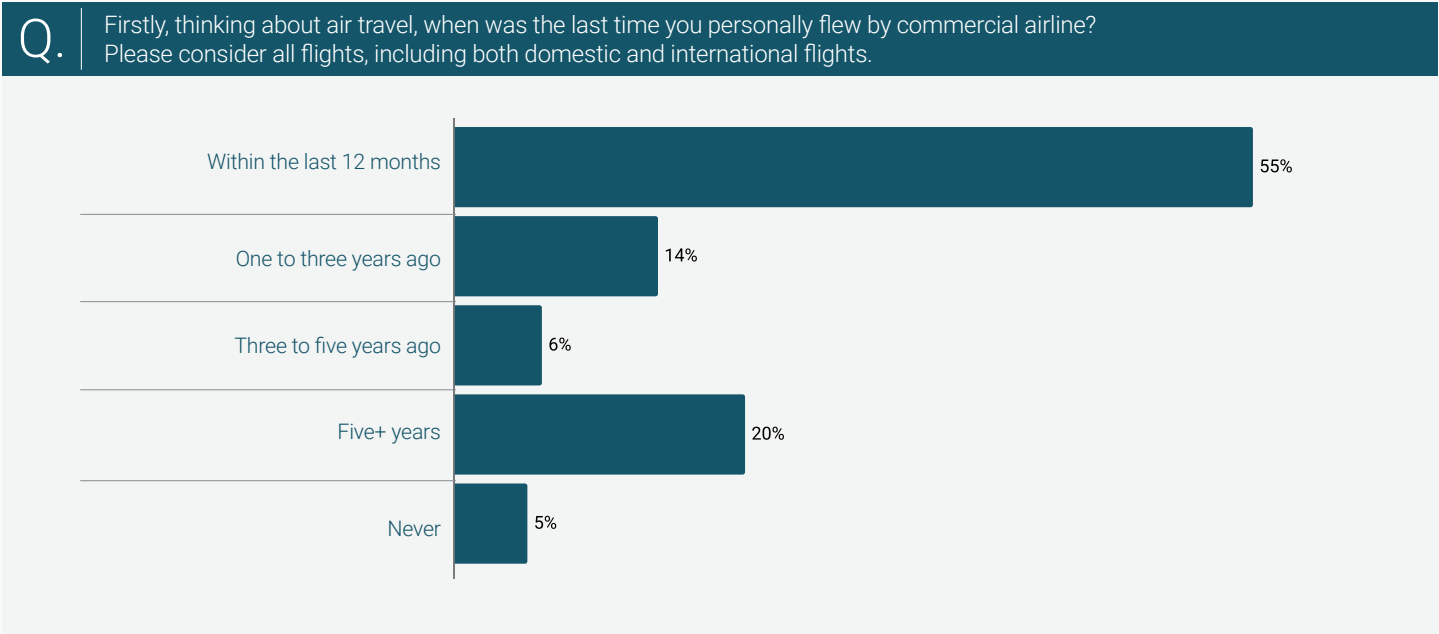


But most people agree that aviation is important to the UK economy, that advantages of air travel outweigh disadvantages, and that they personally benefit from taking flights from UK airports.

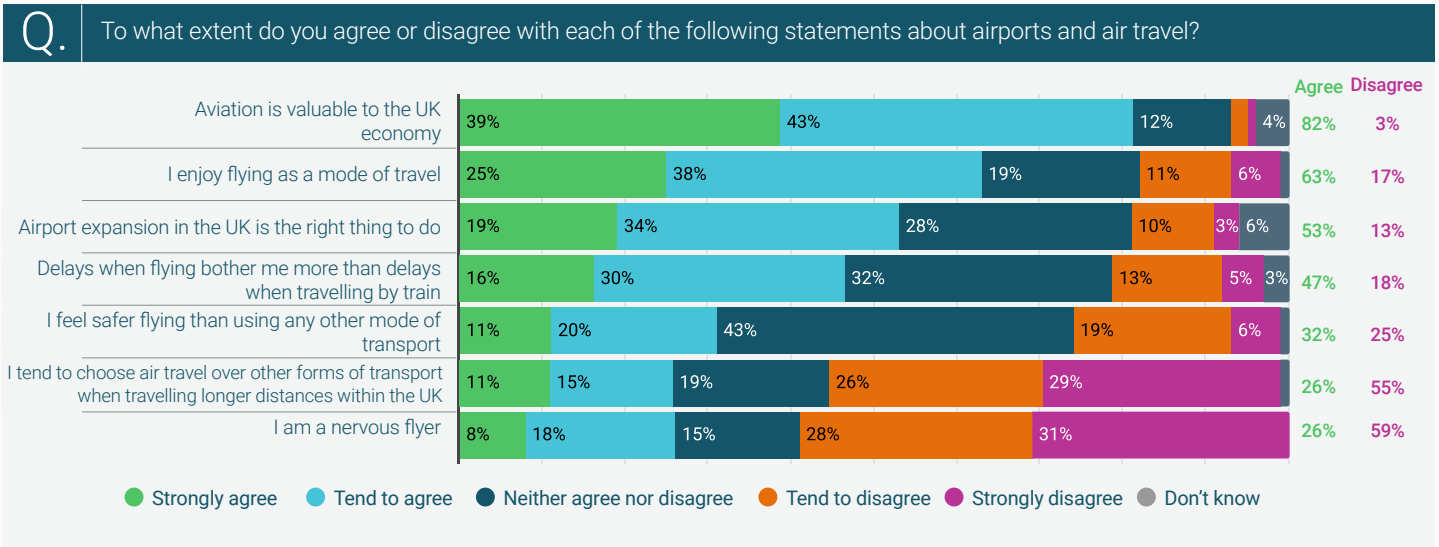
Q. To what extent do you agree or disagree with each of the following statements?



These positive attitudes are reflected in people's travel behaviour. More than half of UK adults (55%) have flown within the past 12 months, representing the highest level of commercial flying since before the COVID-19 pandemic and reaffirming aviation's continued importance to how people travel, work and connect with others.



Rising demand increases the importance of ensuring the aviation system can operate efficiently. As more people choose to fly, expectations around reliability, resilience and capacity are likely to become even more significant, thereby placing greater emphasis on ensuring the aviation system can accommodate future demand without compromising performance.



On-time performance remains the public's top priority



On-time performance remains the public's top priority

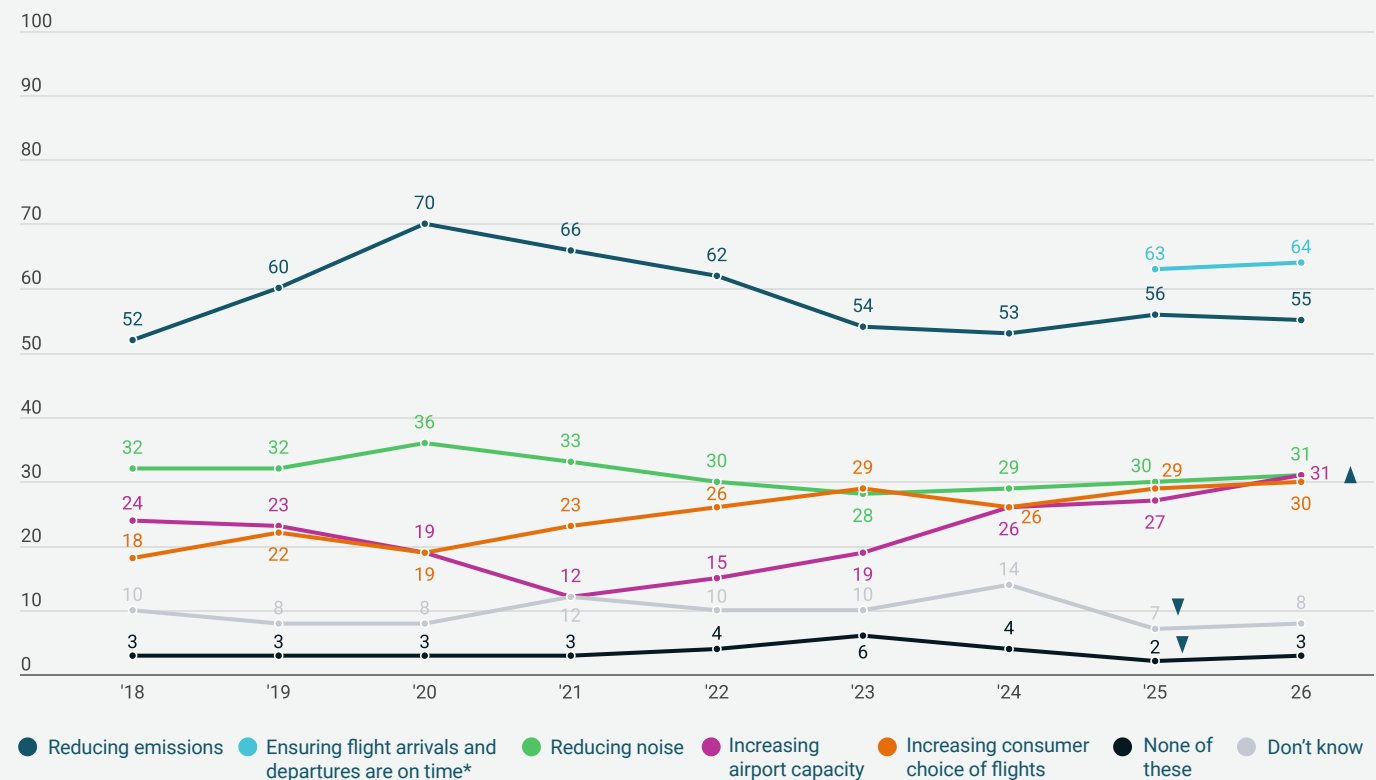
While people recognise the importance of modernising the UK's airspace infrastructure, support for reform is driven less by the process itself and more by the outcomes it can deliver. Above all, people want an aviation system that provides reliable and efficient journeys.

As in 2025 when the question was first asked, ensuring flights arrive and depart on time is the highest priority for improvement. Nearly two-thirds (64%) say this should be prioritised by the aviation industry, placing it ahead of reducing emissions (55%), and increasing airport capacity (30%). While there is support for long-term ambitions around growth and sustainability, their day-to-day experience of aviation remains shaped by whether journeys operate smoothly and predictably.

This emphasis on performance reflects growing expectations that the aviation system should continue to operate efficiently as demand recovers. As more people return to flying, reliability remains a key measure of how people experience aviation. Meeting these expectations will require an aviation system capable of accommodating growing demand while operating more efficiently and reliably.

Ensuring flight arrivals and departures are on time was a top priority in 2026 (64%), followed by reducing emissions (55%). There has also been a small but significant increase this year in the proportion of the UK public who prioritise increasing airport capacity.

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?



*'Improving flight times between destinations' was replaced with 'Ensuring flight arrivals and departures are on time' in 2025.

▲▼ Significant difference from previous year

Airspace modernisation recognised as key to aviation's future



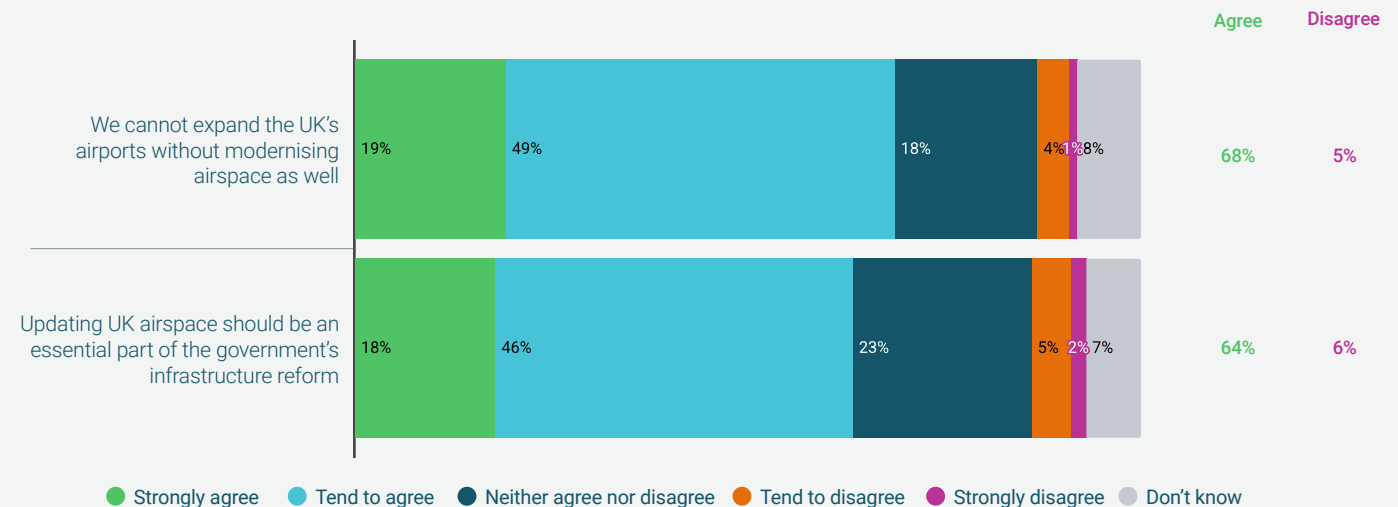
Airspace modernisation recognised as key to aviation's future

The growing emphasis on reliability and resilience also helps explain attitudes towards airspace modernisation. Rather than viewing it as a technical programme, the public see it as a practical means of delivering the outcomes they value most: more reliable journeys, greater capacity and a more sustainable aviation system.

More than two-thirds (68%) agree that airport expansion cannot happen without airspace modernisation, while 64% believe updating UK airspace should be an essential part of the Government's wider infrastructure reforms. Public attitudes indicate that airspace modernisation is seen as a prerequisite for future growth and improved operational performance, rather than simply a technical upgrade of existing systems.

Most people agree that the UK's airports cannot be expanded without modernising airspace, and that updating UK airspace should be an essential part of the Government's infrastructure reform.

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



Support for reforms that enable a more efficient airspace system remains resilient. Around half of the UK public (51%) support changes to flight paths across the UK, while 8% remain undecided. Given that changes to flight paths can be complex, maintaining majority support suggests people are willing to accept practical reforms when the wider benefits, such as reducing delays, improving efficiency and supporting future growth are clearly understood.

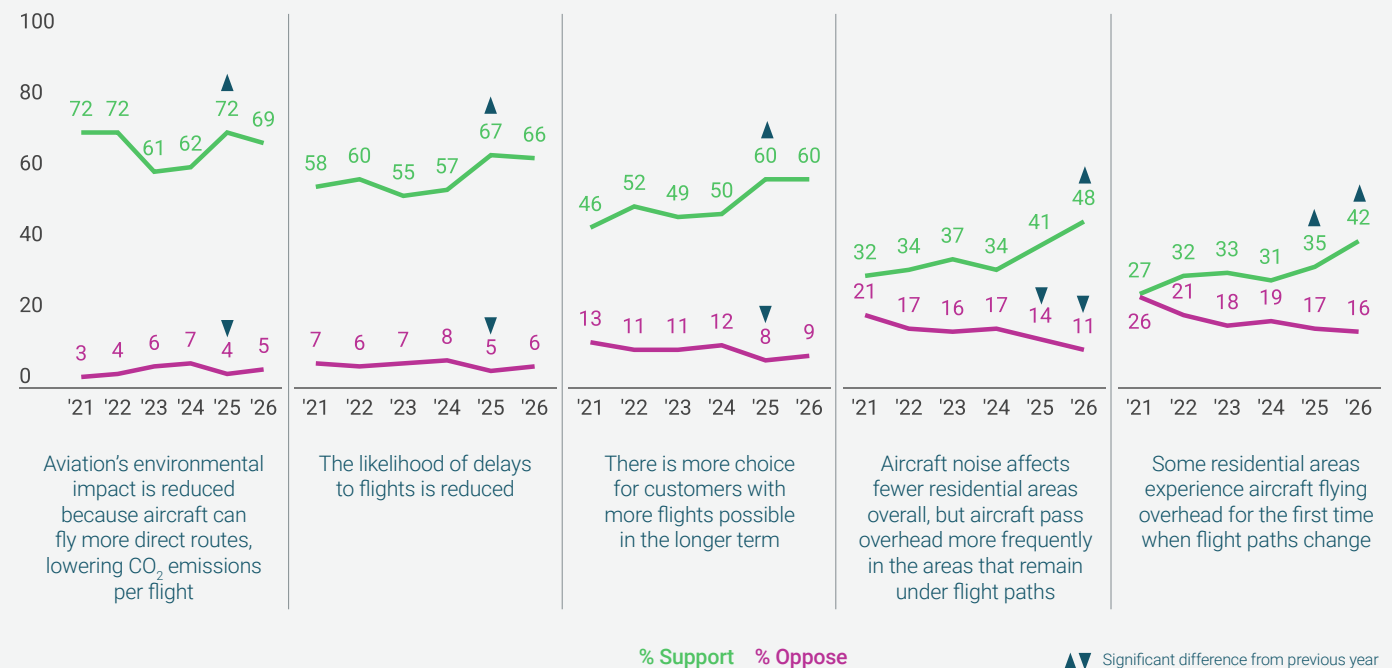
This is reinforced when people are asked about the outcomes modernisation could deliver. A majority support changes to flight paths where they reduce environmental impacts, minimise delays or provide greater consumer choice, indicating that acceptance is closely linked to tangible public benefit rather than the changes themselves.

Despite relatively low awareness of the airspace modernisation programme itself, the findings suggest the public is receptive to practical reforms when they are framed around the improvements they enable.



A majority support changes to flight paths if environmental impact is reduced, if there are fewer delays, and more customer choice.

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



Perceptions of aviation's environmental impact remain high



Perceptions of aviation's environmental impact remain high

Improving operational performance is only one part of the challenge. As the aviation system grows, people also expect the industry to reduce its environmental impact.

As flight numbers return to pre-pandemic levels, public attention naturally turns to aviation's environmental impact. Aviation remains widely perceived as a significant contributor to climate change. Approaching three in ten (28%) respondents identify emissions from aviation as one of the main causes of climate change, placing it alongside construction and manufacturing and ahead of several other sectors.

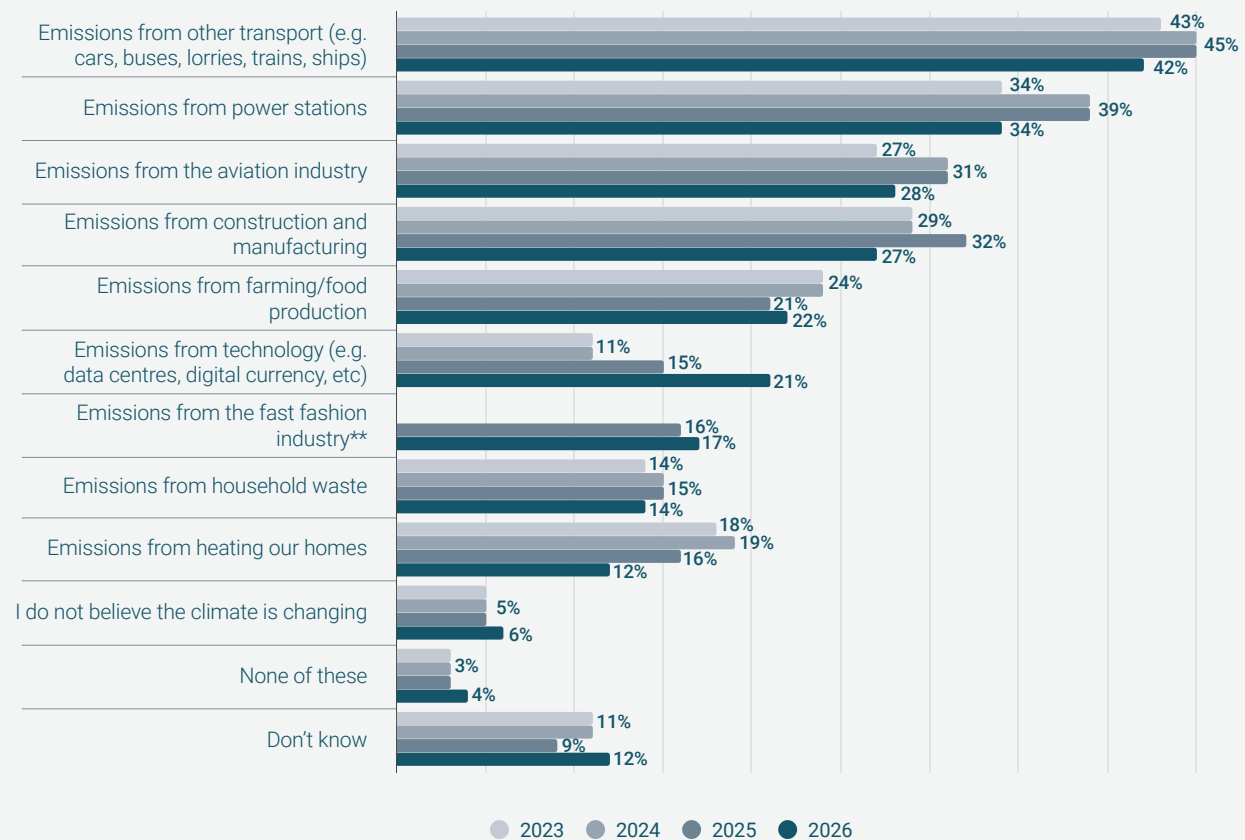
However, this perception contrasts with aviation's actual contribution to global greenhouse gas emissions, which is considerably smaller than many of the other sectors people rank similarly or above it.

Aviation continues to occupy a prominent position in public discussions about climate change, despite representing a relatively modest share of overall emissions. This gap between perception and reality highlights a continued tendency to overestimate aviation's contribution relative to other sectors.

Emissions from other transport modes continue to be the main perceived cause of climate change, followed by emissions from power stations and the aviation industry.

Q.

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

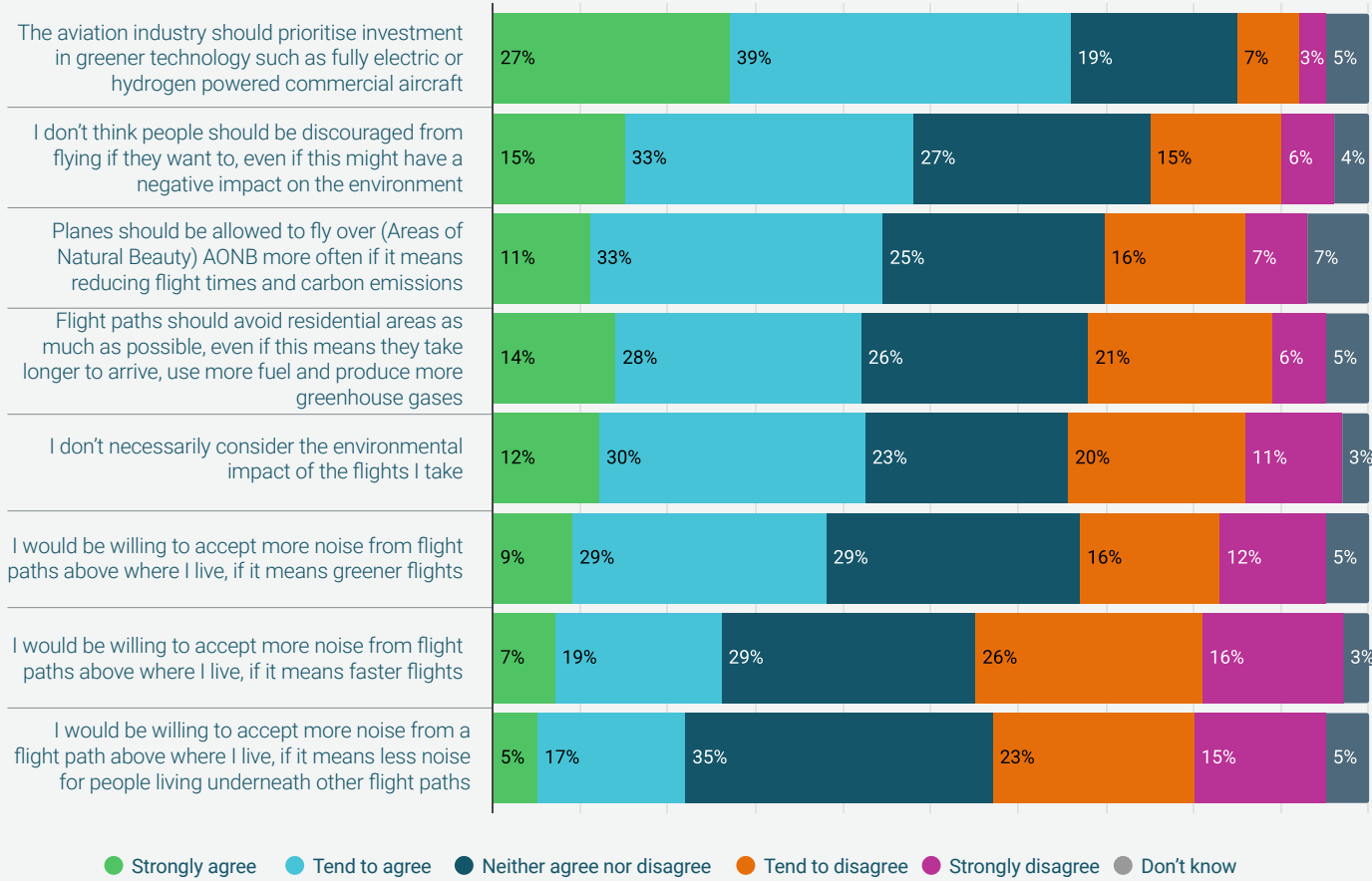


While reducing emissions remains a priority (55%), there is growing evidence that people favour practical solutions that enable aviation to become more sustainable while preserving the benefits it delivers. Rather than focusing solely on restricting demand, they support approaches that improve efficiency, harness innovation and reduce emissions through technological advancement.

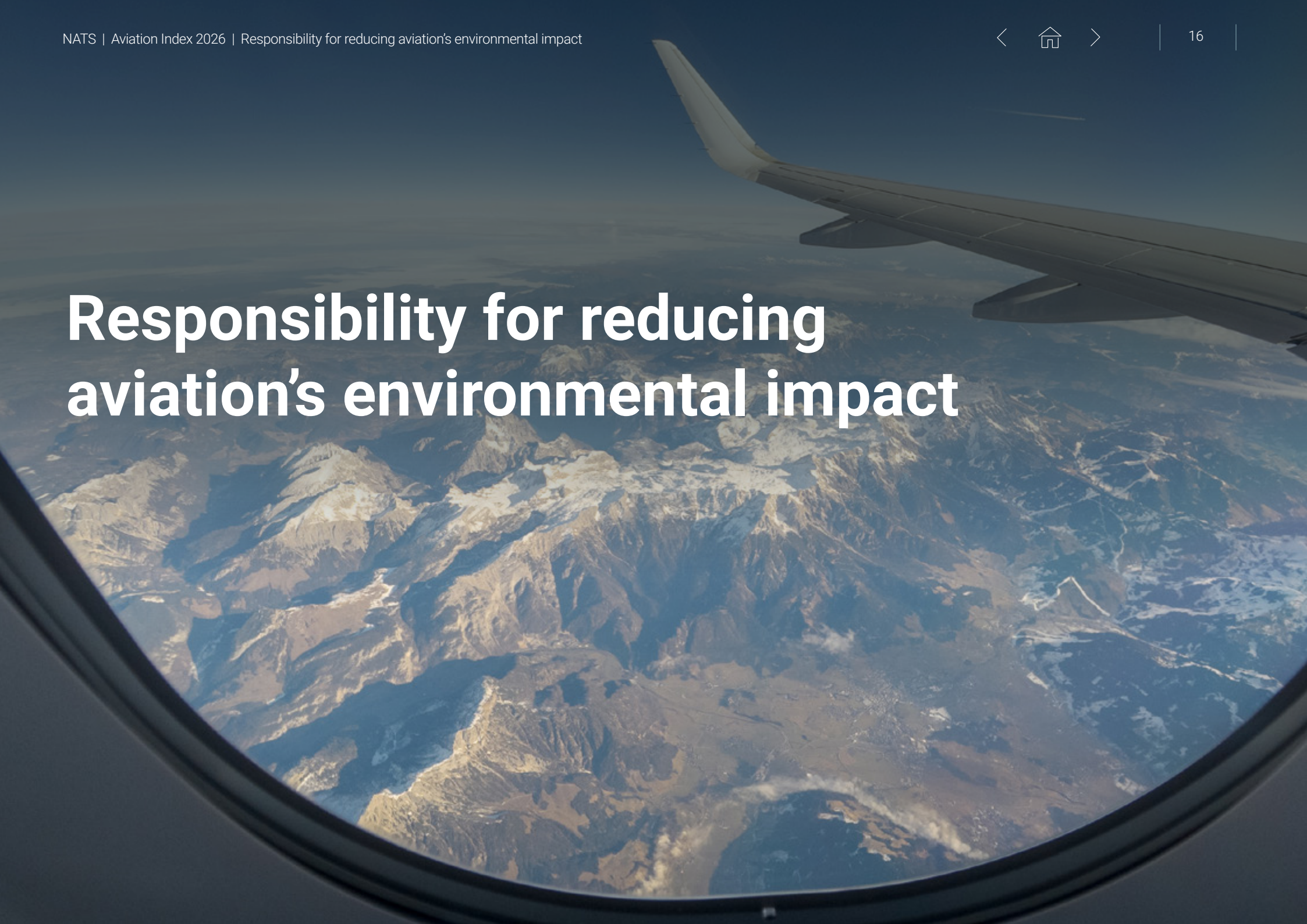


Most agree that the aviation industry should prioritise investment in greener technology.

Q. To what extent do you agree or disagree with each of the following statements about air travel and the environment?



Responsibility for reducing aviation's environmental impact

The background of the slide is a high-angle aerial photograph taken from an airplane window. The view shows a vast, rugged mountain range with numerous peaks and valleys. The terrain is a mix of brownish-tan and light grey, suggesting a combination of rocky ground and snow or ice patches. The sky above the mountains is a clear, deep blue. The airplane's wing and part of the fuselage are visible in the upper right corner, framing the view of the landscape.

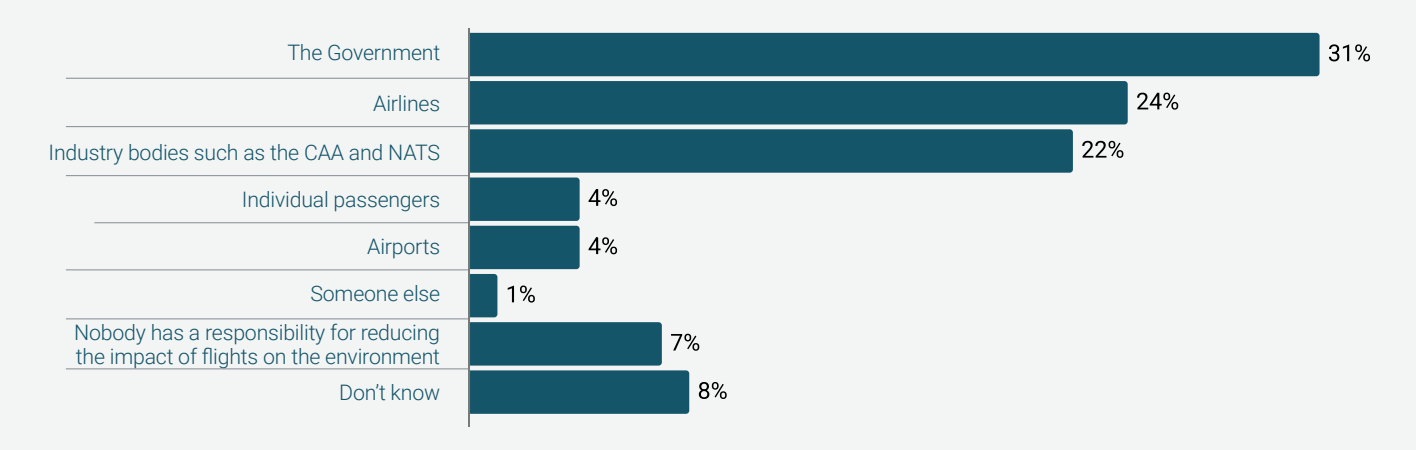
Responsibility for reducing aviation's environmental impact

While there is an expectation for aviation to play its part in addressing climate change, responsibility for reducing emissions is seen as resting primarily with organisations rather than individual travellers.

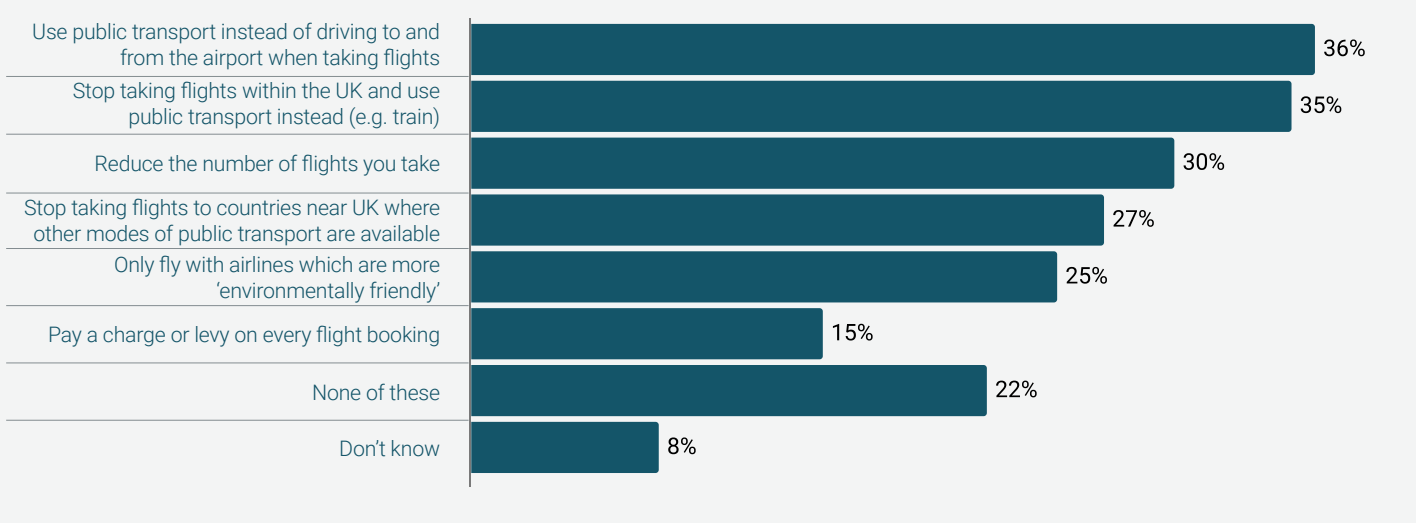
The UK Government is viewed as having the greatest responsibility for reducing aviation's environmental impact, with 31% identifying it as the organisation that should take the lead. Airlines follow closely behind at 24%, while 22% believe responsibility sits with industry bodies such as NATS and the Civil Aviation Authority. In contrast, just 4% say individual passengers should bear the primary responsibility.

There is also a continuing gap between environmental concern and behavioural change. More than a fifth (22%) say they would not be willing to take any of the actions presented. Measures that involve limiting personal travel attract lower levels of support than solutions focused on improving the aviation system itself. This suggests greater public appetite for industry-led solutions that reduce emissions.

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



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?

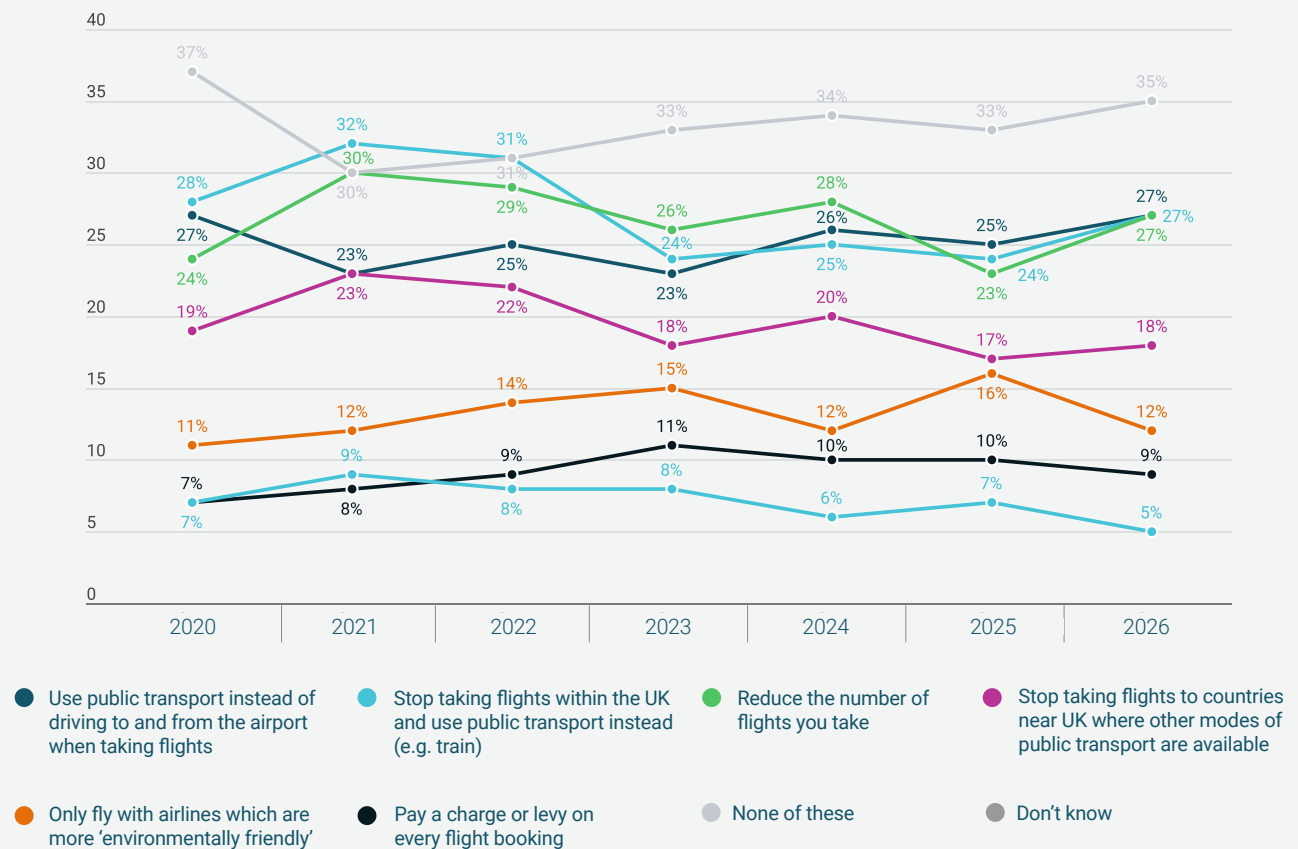


Despite this, many people say they are already taking steps themselves to reduce the environmental impact of their travel. More than a third (36%) say they use public transport instead of driving to and from airports, while 35% are willing to avoid domestic flights and choose rail or other public transport alternatives where practical. Around three in ten (30%) say they are prepared to reduce the number of flights they take, while a quarter (25%) would choose airlines they perceive to be more environmentally responsible.



The trend on personal actions to help reduce the environmental impact of flights remains stable – around one in three people are not taking any action.

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



Looking ahead: a public increasingly open to aviation innovation



Looking ahead: a public increasingly open to aviation innovation

The 2026 Aviation Index suggests that public attitudes towards the future of aviation appear pragmatic, with support strongest where clear practical benefits are visible. While concerns around safety, sustainability and regulation remain important, there is growing acceptance that innovation will play a critical role in helping the sector meet future challenges.

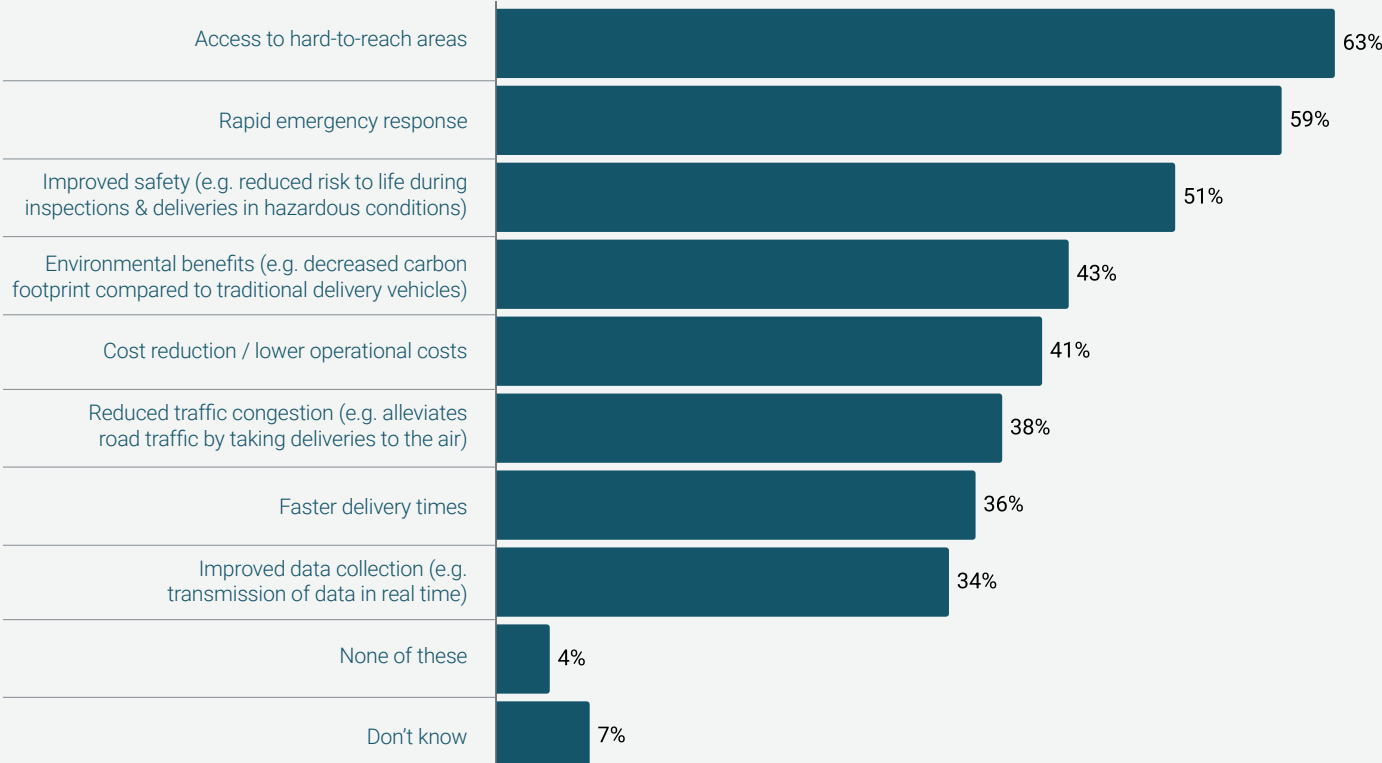
This shift is evident throughout the research. The public wants aviation to improve performance, reduce environmental impacts and accommodate future demand, yet there is relatively little appetite for solutions that rely solely on restricting travel. Instead, people favour approaches that use technology, smarter operations and new forms of air transport to improve how the aviation system functions.

Against this backdrop, support for emerging aviation technologies remains strong, particularly where clear public benefits can be demonstrated.

Drones provide perhaps the clearest example of this trend. Drone technology is associated with practical and societal benefits, with the ability to access hard-to-reach locations (63%), enable rapid emergency response (59%) and improve safety (51%) viewed as the technology's greatest advantages.

The top three benefits of drones are their access to hard-to-reach areas (63%), rapid emergency response (59%) and improved safety (51%).

Q. Which of the following benefits, if any, do you think there are about the use of drones?



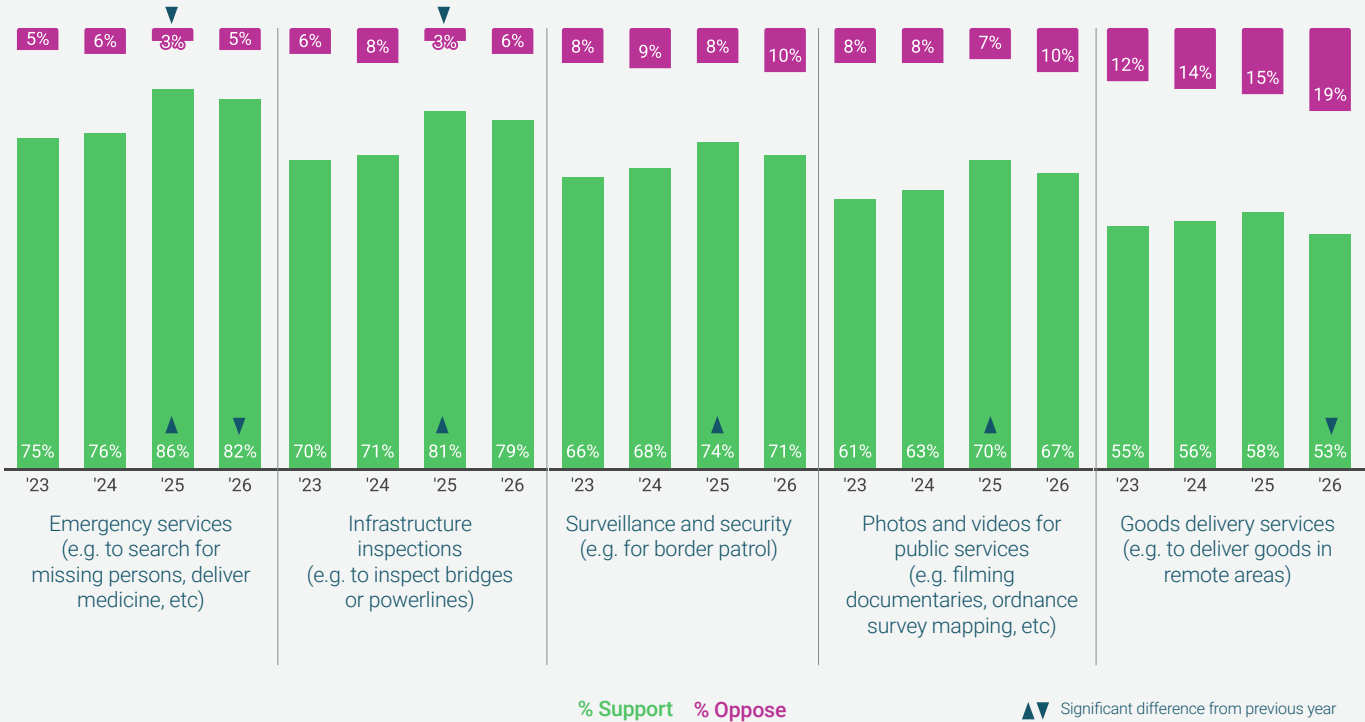
These benefits are reflected in strong support for a range of drone applications. More than four in five people (82%) support the use of drones for emergency services and search-and-rescue operations, while almost as many (79%) support their use for inspecting critical infrastructure. Although support for some drone applications has softened slightly since 2025, public backing remains consistently high where drones are seen to improve safety, efficiency and public outcomes.

Acceptance of emerging aviation technologies appears to depend largely on whether people can see a clear benefit.



Despite a slight decline in support for drone usage in various applications compared to 2025, emergency services (82%) and infrastructure inspections (79%) continue to have strong support.

Q. Drones are currently being used in some areas to support healthcare, policing, search & rescue and other public services. To what extent do you support or oppose drones being used for the purposes of...



Cautious optimism around Artificial Intelligence



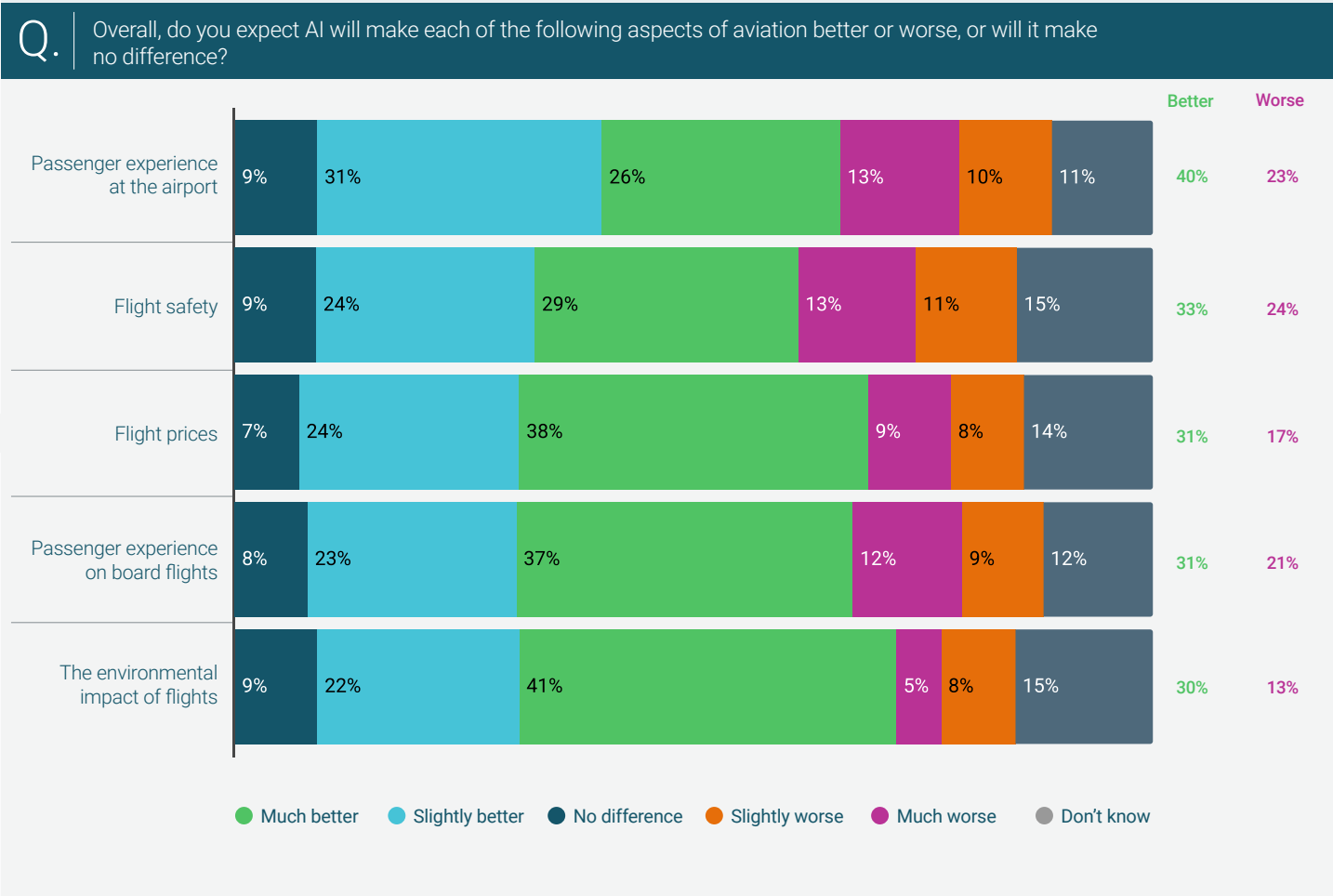
Cautious optimism around Artificial Intelligence

If flying taxis and other new forms of air transport represent the future of how people and goods may move, Artificial Intelligence could play an important role in how the aviation system operates in future.

The 2026 findings reveal a UK public who are comfortable with AI playing a supporting role across aviation and transport. There is some positivity about applications that improve efficiency, enhance customer experience or support operational decision-making. However, attitudes towards AI is not without conditions, with perceptions varying considerably depending on how and where the technology is applied.

Opinion is divided on the potential impact of AI across several aspects of aviation. Unlike drones, where benefits are often seen as tangible and easily understood, attitudes towards AI are shaped by both optimism and uncertainty. While many expect the technology to improve passenger experiences and operational efficiency, views are more mixed when it comes to its impact on areas such as ticket prices, environmental performance and flight safety.

Opinion is divided in terms of perceived impact of AI on various aspects of aviation including passenger experience, prices, and environmental impact of flights.



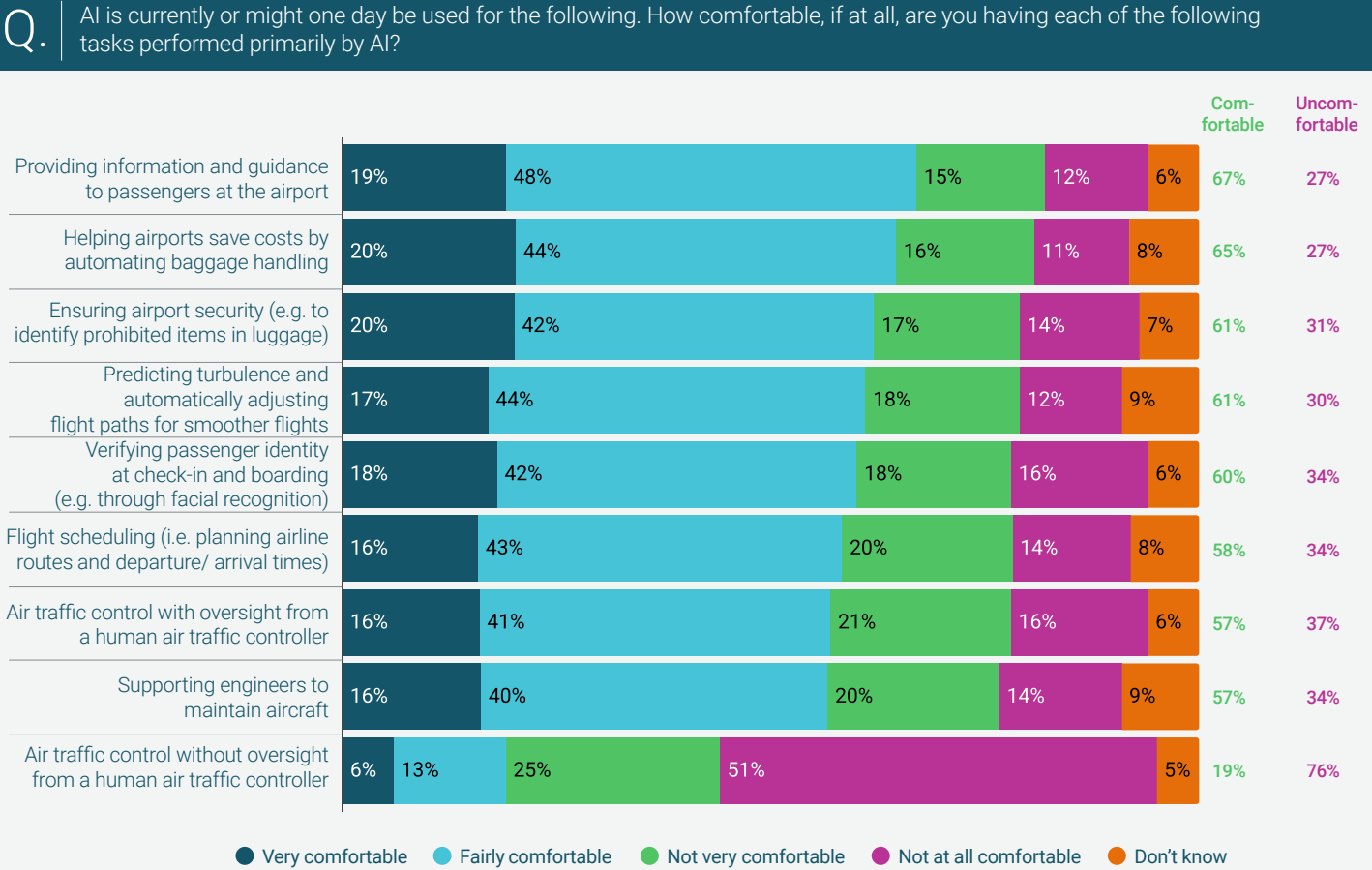
The greatest confidence exists in applications where AI is used to support passengers and streamline routine processes. Most (67%) say they would be comfortable with AI being used to provide information and assistance to passengers at airports, suggesting strong support for applications that help make journeys easier, quicker and more convenient. Two-fifths (40%) believe AI will improve the passenger experience at airports, reflecting an expectation that the technology can help deliver smoother, quicker and more convenient journeys.

Support for AI is not unconditional. While people recognise the potential benefits AI can bring, many remain unconvinced that those benefits should extend to safety-critical functions without human involvement.

There are clear concerns when AI is perceived to be replacing human judgement in safety-critical roles. More than three-quarters (76%) would be uncomfortable with AI managing air traffic control without oversight from a human controller, making autonomous air traffic control the least acceptable application tested in the study. Similarly, while 40% expect AI to improve the passenger experience, 24% believe it could make flight safety worse.

The UK public appears willing to embrace AI where it enhances convenience, efficiency and customer service, but remains reluctant to hand over responsibility for functions where safety is paramount. Respondents are more comfortable with AI in supporting or passenger-facing roles, and far less comfortable where it is perceived to replace human oversight

The UK public are most comfortable with AI providing information and guidance to passengers at the airport, and with automating baggage handling. They are least comfortable having autonomous air traffic control.



Conclusion

The public continues to value aviation's contribution to the UK economy, its role in connecting people and places, and the opportunities it creates for individuals and businesses.

The expectations of the UK public are also pointing towards an aviation system that is more reliable, more efficient and more sustainable and there is recognition that achieving these goals will depend on modernising the infrastructure, technologies and systems that keep the sector running safely and efficiently.



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