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# Drone and Advanced Air Mobility Survey for All Local Authorities

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# Future Flight Challenge Social Science National Survey and Public Dialogue – Headline Findings

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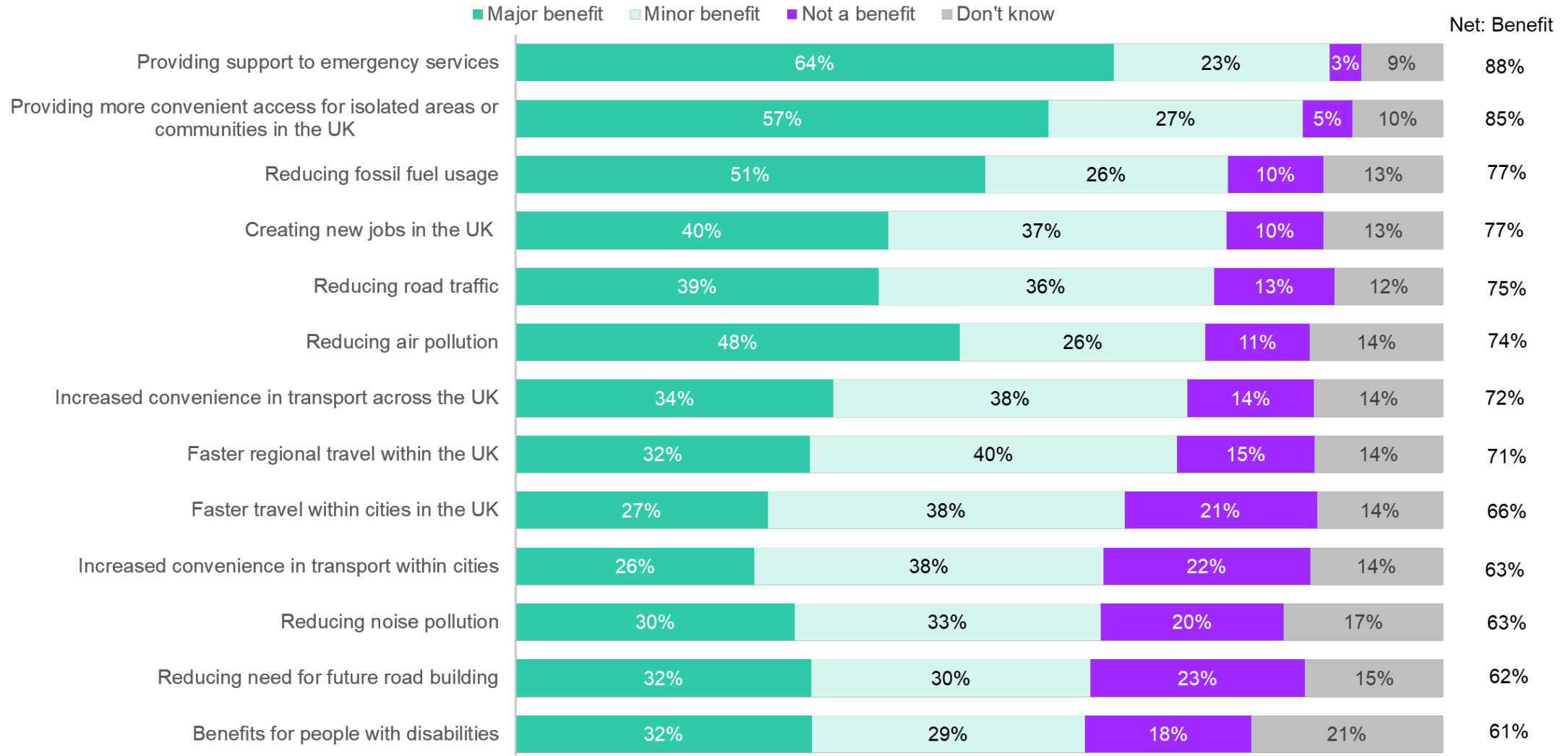
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# Future Flight National Survey and Public Dialogue

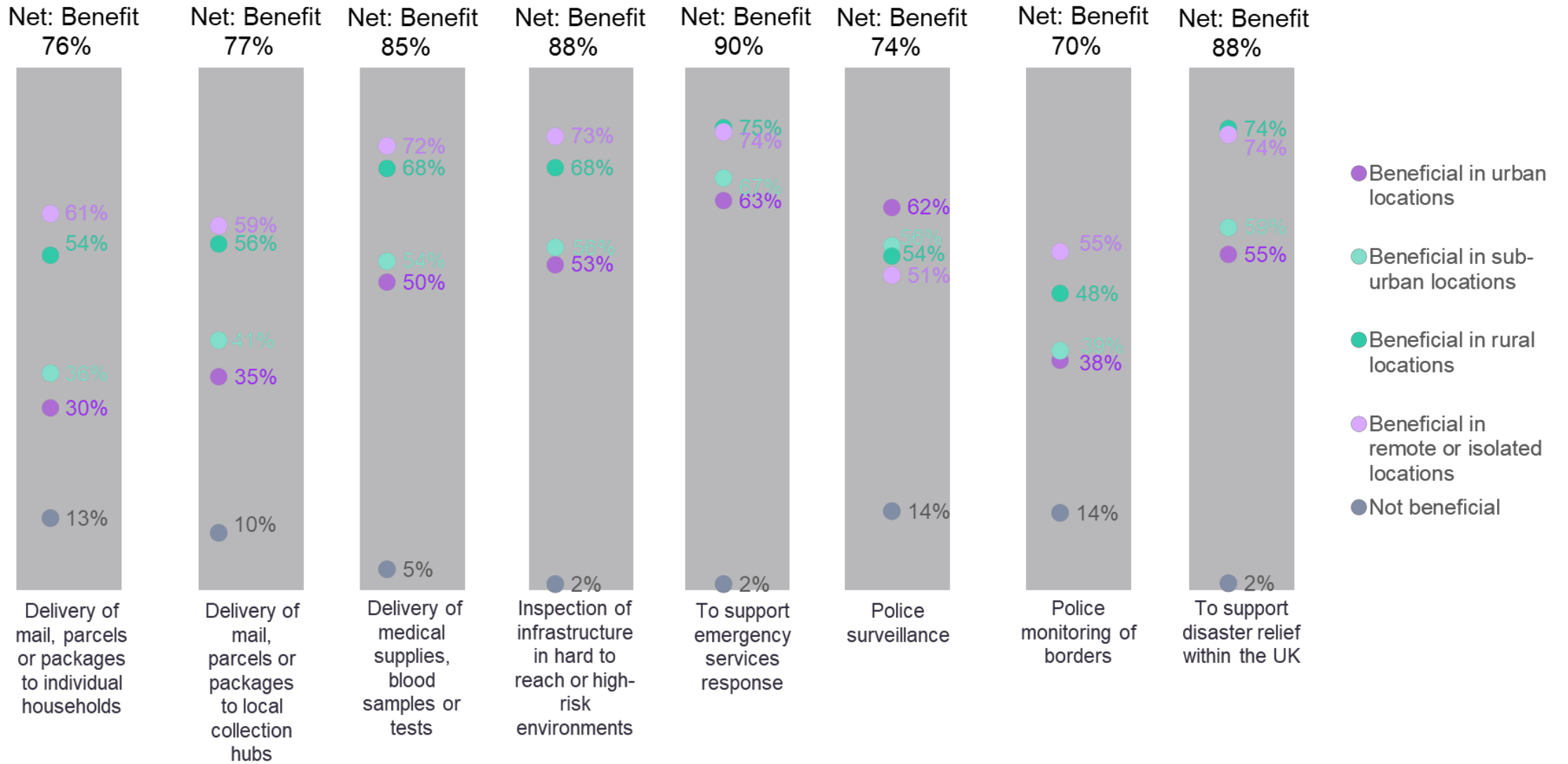
As part of a wider programme of social science research funded by the Future Flight Challenge, two studies of publics' views on Future Flight in the UK were commissioned:

- A deliberative dialogue, with 43 participants (reflective of the diversity of the UK) taking part in a series of 7 workshops between January–April 2024. The dialogue was supported by UKRI's Sciencewise programme and delivered by Thinks Insight & Strategy.
- A UK-wide survey conducted by YouGov between 28<sup>th</sup> March – 11<sup>th</sup> April 2024, among a nationally representative sample of 3,279 adults aged 18+ living in the UK. To ensure representativeness, quotas were set during fieldwork on age, gender, social grade, urban/rural status and region. A small boost was applied in Northern Ireland.

# Public Perceptions of potential benefits of future flight technologies (Base: All (n=3,279))



# Public Perceptions of Potential benefits of drone use regionally All (n=3,279)



## Top 5 potential drawbacks:

- cyber-security,
- impacts on wildlife,
- safety,
- congestion in the sky,
- socio-economic exclusion,
- privacy,

	Urban		Suburban		Rural	
1	Cyber Security Threats	80%	Cyber Security Threats	81%	Cyber Security Threats	83%
2	Impacts on animals	79%	Safety of the technology	80%	Potential for skies to become crowded with aircraft	81%
3	Prohibitive expense of the technology	77%	Impacts on animals	79%	Potential for use in criminal activity	79%
	Invasions of privacy					
4	Safety of the technology	76%	Collisions into ground or buildings	78%	Impacts on animals	78%
	Potential for skies to become crowded with aircraft					
5	Habitat destruction	74%	The potential for use in criminal activity	77%	Safety of the technology	76%
	Mid-air collisions with other aircraft		Potential for skies to become crowded with aircraft		Invasions of privacy	
			Mid-air collisions with other aircraft		Mid-air collisions with other aircraft	

# Dialogue Principles - Overarching principles:

- i. Future Flight technologies must be used for public good.**
- ii. Research and testing must ensure policy/regulation is set up before roll-out and updated regularly.**
- iii. Development of technology and services must involve both specialists and public.**
- iv. Developers and operators must be held to account by independent bodies.**
- v. Technology and development must be transparent.**
- vi. Roll-out and operation of technologies must be properly resourced to ensure human accountability – particularly in relation to safety, piloting and managing airspace.**
- vii. The UK as a whole must benefit from leading in these technologies and behave ethically (e.g. in ensuring international supply chains were ethical and sustainable).**



# Dialogue Principles -**Topic Specific principles:**

- viii. Technologies must be managed safely to appropriate safety standards.**
- ix. Flight paths must limit negative impact from noise pollution and visual congestion.**
- x. Vehicles and operations must be designed with accessibility in mind.**
- xi. Services must be affordable to the public.**
- xii. Negative impacts on wildlife must be avoided.**
- xiii. Job opportunities must be available in a fair and accessible way.**
- xiv. Using surveillance drones must match the level of threat, with clear guidelines and oversight for use.**

## Top level points:

Overall, there is an indication from UK publics that the benefits of future flight technologies could be perceived as outweighing the drawbacks. This is especially notable where Future Flight could:

- **Provide benefits to public services delivery** in terms of reducing cost and increasing efficiency.
- **Increase connectivity across the UK**, not only to rural, remote or isolated communities, but to larger population centres (e.g. transport between towns and cities) which are currently poorly served by public transport, road or rail connections.
- **Increase overall sustainability of UK wide transportation systems** and the reduction of fossil fuel usage within aviation and overall, as part of wider integrated green transport approach.
- **Increase economic opportunities for the UK** as part of a wider green economy and the creation of range of new skilled jobs across the UK (e.g. manufacturing, engineering, drone or eVTOL pilots, airspace management etc)

This is underpinned by strong support for greater levels of government involvement in the technology and transport sectors, as well as on climate change.

However,....

However, there are some important caveats to this support:

- **Socio-economic inclusion is a priority concern.** There is an appetite for better sustainable connectivity across the UK, but only if it delivers benefits to all UK citizens not just an elite few or wealthy groups.
- **Accountability and transparency are vital in building public trust** in Future Flight technologies, systems and services, with developers and operators being held to account by independent bodies that act as a bridge between government, industry and the UK public.
- **The dialogue highlighted concerns over the potential lack of overall or joined up oversight of the roll out of Future Flight technologies, systems and services.** This ties into concerns over the ‘commercialising the sky’ and that the roll out could be incoherent, with little leadership, regulation, national policy or strategy to guide its deployment leading to only wealthy elites benefitting.
- **The potential for negative impacts on biodiversity and wildlife was a priority concern for both survey respondents and dialogue participants.**
- **Top-level concerns overall relate to** cyber-security, impacts on wildlife, safety, sky congestion, socio-economic exclusion, privacy, accessibility and noise.

Noise was not in the top five concerns in the survey and was not one of the more pressing concerns raised in the dialogue – this may however change once services start to be rolled out.

## An ideal future: participant visions of a successful and unsuccessful deployment:

- **In the best-case scenario**, participants hoped Future Flight services would deliver social, environmental and economic opportunities for all. They supported the opportunity for better connectivity across the UK, through affordable and more sustainable journeys. In addition, they saw Future Flight as an opportunity for more accessible travel, including those with disabilities, health conditions and those experiencing other barriers to access current public transport.
- **In a worst-case scenario**, participants worried that roll-out would be badly managed while diverting investment away from other modes of public transport. Concerns surrounded whether Future Flight services would be affordable to the public and safe to use, as well as risks to wildlife and jobs, and the potential for increasing noise and visual congestion. There was also scepticism around the sustainability and ethics of the manufacture and powering of Future Flight vehicles.

<https://futureflightsocial.ac.uk/research/>



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